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Understanding Older Adults in Education:

Decision-Making and Elderhostel

A Thesis in Partial Fulfilment of the degree of

Master of Arts in
Administration and Policy Studies
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Abstract

This qualitative study explores how older adults, who are retired or contemplating retirement, make choices regarding their non-formal educational experiences. This national study collected data from 154 Elderhostel participants, aged 42 to 85 and, consistent with Moustaka's five phases of phenomenological analysis, triangulated the data from 17 focus groups, 10 in-depth interviews, and a demographic questionnaire.

The choice of Elderhostel as an educational venue for learning, and the specific course selection, were found to be influenced by 14 factors: location, travel, program, course content, accommodations, cost, dates, negotiation with travel partner, social, sites, personal requirements, escape, information, and the policies, philosophy and program requirements of Elderhostel. A participant typology emerged during the data collection and analysis and revealed six types of Elderhostelers: the activity oriented, geographical guru, experimenter, adventurer, content-committed, and the user.

The study of decision-making processes in education is in its infancy. This study paves the way for the doctoral study to expand on this foundation of knowledge by quantitatively investigating the 14 factors which were identified, defined, and examined in this study.

Résumé

Cette étude quantitative explore la façon dont les personnes âgées, qui sont à la retraite ou qui anticipent une retraite, exercent leur choix d'éducation non conventionnelle. Cette étude nationale a recueilli des données de 154 participants d'Elderhostel âgés de 42 à 85 ans. Fondée sur les cinq phases de l'analyse phénoménologique de Moustaka, l'étude synthétise l'information extraite des discussions de 17 groupes-cibles, de 10 entrevues individuelles et d'un questionnaire démographique.

Le choix d'Elderhostel comme véhicule éducatif et la sélection spécifique de cours sont influencés par 14 facteurs: lieu, déplacements, programme, contenu de cours, hébergement, coûts, dates, négociation avec le compagnon de voyage, social, sites, besoins personnels, évasion, information, et règlements, philosophie et besoins reliés au programme d'Elderhostel. La collation et l'analyse de l'information ont permis de définir six types de participants d'Elderhostel: la personne qui s'intéresse aux activités, le gourou de la géographie, l'expérimentateur, l'aventurier, la personne qui s'intéresse au contenu des cours, et l'utilisateur.

L'étude du processus décisionnel en matière d'éducation en est à ses premiers pas. Cette étude prépare le terrain pour le doctorat qui élargira cette fondation de connaissances grâce à une enquête quantitative des 14 facteurs qui ont été étudiés, définis et analysés dans cette étude.

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Chapter I

Introduction

The 21st century will witness a new paradigm of aging. The next millennium will embrace a new kind of older adult, healthier, better educated, more financially secure (Jean, 1995; Martin & Preston, 1994). The needs, interests, and expectations of retiring baby boomers will be significantly different than those of their parents and grandparents. Future generation elders will seek continued personal growth in their retirement years, and hence, the demand for educational programming for an aging population will intensify. Despite this fact, there is little evidence to demonstrate that governments and educators, at any level, are prepared for the transition ahead (Thornton, 1992).

The world's population is aging at a rate unprecedented in history. This important social phenomena is due primarily to decreased fertility and increased longevity. "By the year 2025 the United Nations anticipates that there will be 822 million people in the world aged 65 and over; a number that exceeds the present combined populations of Europe and North America" (Preston & Martin, 1994, p.1). In the early 1900's, 4% of the United States population and 5% of the Canadian population were 65 years of age and older. Forecasts for the year 2000, which include the baby boom population, will reach an all time high with approximately 20% of all North Americans over the age of 65 (Longino Jr, 1994; Ray, Harley & Bayles, 1983; Thornton, 1992).

Mergenbagen (1994) identified retirement as one of the most difficult transitions in life. Individuals must adjust to the realities of the third age, the post employment phase of life. Adjusting to life in the third age is essential, but for many, difficult. Baby boomers, who have had increased access to education throughout their lives, will continue to seek educational opportunities as a way to adjust to the challenges of the third age (Adair & Mowsesian, 1993). Leading adult educators agree that education has always been used to adjust to life's changes and there is no reason to believe that this would differ in retirement (Cross; 1981, 1992; Havighurst, 1969; Selman & Dampier, 1991; Wlodkowski, 1991).

Lifelong learning interests will not fade away because individuals retire. On the contrary, the need for educational programs and services for the mature adult should increase (Pearce, 1991).

As the elderly population grows, so does the need to understand their learning needs. Sadly, to date, "there have been few programs or research initiatives explicitly devoted to the education of the older adult for an aging Canadian society" (Thornton, 1992, p. 415). The Deputy Minister of Health Canada echoed Thornton in her opening address at the Third International Conference on Educational Tourism. She spoke of the "crying need for research, one in which a vital role can be played by such organizations as seniors' universities, adult education services working with seniors, and organizations like Elderhostel" (Jean, 1995, p. 6).

A tremendous amount of research over the past five decades has examined the motivations of adults and older adults in education (Romaniuk & Romaniuk, 1982). In 1981, Heisel, Darkenwald and Anderson wrote that there does not seem to be a great need for further descriptive studies of participation in adult education by older adults and adults in general. What is needed, they claim, is research aimed at generating and testing theoretical paradigms and propositions. In harmony with this suggestion, this investigation aims to reach beyond the studies which currently examine participation and focus in a new direction: understanding the decision-making process.

Statement of the Problem

The purpose of this study is to gain understanding about how older adults, who are retired or contemplating retirement, make decisions regarding their educational experiences. More specifically, this qualitative study with Elderhostel participants investigates the factors associated with decision making, examines how they are sequenced, and endeavours to create a typology of the older adult learner.

Education for Older Adults

All people, to varying degrees, participate in both formal and informal educational activities throughout their lives. The percentage of time available to education is partly dictated by ones *'age and stage'* in life, as well as personal interests. As in each phase of life, the time available for educational activities during retirement is unique. Adults, having accrued a life-time of interests, may elect to continue these same interests into their golden years or they may seek new learning opportunities and explore a subject which, earlier in life, they never had time to enjoy. Whatever the reason, there is a role for education.

Elderhostel has been the leading educational venture for retired adults since its inception in 1974. It has been a model organization that promotes the positive aspects of aging and has been an inspiration to others interested in meeting the needs of seniors (Mills, 1993). Elderhostel, however, was not the first organization to reach out to older adults. Some universities, institutes, and colleges had already been providing seniors programs, not to mention the opportunities available at seniors and community centres.

Swedburg (1993) studied the educational opportunities for mature Canadians in a two year cooperative study with Elderhostel Canada and Health and Welfare Canada's Seniors Independence Programme. This study revealed tremendous diversity in educational opportunities for seniors. This diversity was represented in three key variables: (1) activities are being organized according to many different models, (2) the degree to which volunteers manage and teach their own programs varies, and (3) the location where courses/programs are held differ. Despite these diversities, one element was common to all organizations: the *raison d'être* — the learning component.

The degree of formality with educational programming also varies. Two examples, the Institute Movement and New Horizons, illustrate how two different learning organizations meet the needs of mature adults. The institute phenomena was born from a group of retired school teachers dissatisfied and unchallenged by the educational opportunities available to seniors. Conceived in New York City in 1962, the New School for Social Research (NSSR) encouraged these dissatisfied educators to form a self-governing group to teach courses to their peers. The result was the Institute for Retired

Professionals (IRP). Weekly study groups were created, organized by the retired participants, and courses were self-taught. The popularity of this program led to the development of the first Institute for Learning in Retirement (ILR).

Institutes for Learning in Retirement service the educational needs of older adults at a community level. ILR's are sponsored by a variety of higher learning institutions and are known by many names, however, two characteristics are constant. First, ILR's characterize themselves as a community of older learners. Second, college level educational programs are created by the membership themselves. The ILR's are self-funded, democratically governed by the membership, and rely almost exclusively on volunteers to teach classes and guide study groups. Today over 148 ILR's can be found throughout North America, servicing in excess of 25,000 participants (Verschueren, 1995).

In 1987, a collaborative effort between Elderhostel and the ILR's resulted in the Elderhostel Institute Network being launched. The two main goals of the this network include: (1) extending the ILR concept to new people, campuses, and communities, and (2) to support and strengthen existing institutes.

Throughout the evolution of the institute phenomena, other initiatives, outside traditional college and university offerings, were developed. Of particular significance in Canada, was the creation of the *New Horizons Program* by Health and Welfare Canada in 1972. The purpose of the New Horizon initiative was: to encourage the continued use of skills in older adults, to combat social isolation in old age and, to assist the elderly in developing projects of benefit to themselves and their communities. This program, which continues to thrive today, has sponsored over 25,000 projects, all started and run by elders (Novak, 1987). What began as a social experiment has resulted in a cost effective Canadian social program which advances a positive view of aging and engages retired citizens, in their communities, to remain independent and self-sufficient.

Mills (1993), in *The Storey of Elderhostel*, identified three leading international institutions that have played a significant role in the provision of educational opportunities for seniors: the Open University in Great Britain, the University of the Third Age in Europe, and the Scandinavian Folk Education system. Interestingly, the residential concept of the Scandinavian Folk Education system served as a direct inspiration in the

creation of Elderhostel. A residential component is, and always has been, fundamental to Elderhostel.

The range of programs available to mature adults is growing along with the population. Programs designed to meet the learning needs of elders exist at international, national, provincial, and community levels. Understanding how mature adults choose which programs to attend will help organizations plan their programs, develop marketing strategies, and gain new insights about their participants.

Elderhostel and ELDERHOSTEL Canada

Elderhostel provides year-round educational adventures for older adults (Williston, 1996). The purpose of Elderhostel, and its sister organization ELDERHOSTEL Canada, is to promote a positive sense of self, to all people of retirement age, through the provision of a quality liberal arts education. Elderhostel was founded in 1975 by social activists Marty Knowlton and David Bianco. Knowlton and Bianco wanted to take action against one of the major problems of aging in the United States, the negative self-image that society places on its older members. Traditionally, Elderhostel has been a network of college and universities providing short-term, on-campus, low-cost, college level courses (Knowlton, 1977). Today, the range of host institutions has widened to include YMCA's, Lodges, Outdoor Centres, Christian Retreats, and many other commercial sites. The fundamental commitment however, remains the same.

Since Elderhostel's humble beginnings in 1975, when five New Hampshire colleges provided 15 weeks of programming to 220 hostelers, the organization has met phenomenal and unprecedented success (Knowlton, 1977). In the early years Elderhostel grew at a rate of nearly 100% per year (Swedburg, 1991a). By 1980, registration toppled 20,000 participants and Elderhostel programs existed in fifty American states and two Canadian provinces. "The momentum of Elderhostel, after half a decade, is irreversible. Its impact is ultimately immeasurable, as all humanistic advance is immeasurable. But it is real all the same, and a cause for celebration" (Kaplan, 1981). Ten years later, in 1990, three distinct Elderhostel operations enrolled a staggering 236,700 participants. Elderhostel Inc.

— the USA parent organization — accepted registrations from 177,250 participants, the International program (which began in 1980) boasted 45,800 registrations and ELDERHOSTEL Canada generated 13,650 participants. Today, Elderhostel is a worldwide organization that reaches over 350,000 hostelers, in 60 countries at over 2,500 colleges, universities and other institutions (Elderhostel Inc., 1995).

When Elderhostel first expanded into Canada, the programs were managed by the administrative offices in Boston under the direction of the Elderhostel International volunteer board. In 1982, following the appointment of a national director, the first Canadian administrative office was opened in Fredericton, New Brunswick. The popularity of Elderhostel programs in Canada continued to flourish and the need for a separate administrative operation became a reality. In 1986 ELDERHOSTEL Canada was created and represents the first organization to break away from Elderhostel Inc. Today, ELDERHOSTEL Canada thrives as an independent organization and has offered courses to over 18,000 participants in 350 Canadian institutions (Elderhostel, 1996a).

Judged by the number of participants, Elderhostel is a success story. Elderhostel Inc. and ELDERHOSTEL Canada have enjoyed phenomenal growth and a devoted clientele who are *'hooked'* on the programs offered by this organization. Yet, despite the unparalleled success, one fact remains problematic for the organization: certain programs are over subscribed, resulting in long participant waiting lists, while other programs must be cancelled due to lack of interest. Several researchers have examined the motivations of Elderhostel participants (Adair & Mowsesian, 1993; Romaniuk & Romaniuk, 1982; Rice, 1986; Swedburg, 1991b, Wirtz & Charner, 1989), yet no one can explain, or has researched why some programs fail to attract registrants and others over-subscribe. By identifying the important decision-making criteria and understanding how they are prioritized, this study hopes to gain insight to this issue.

Significance of the Study

This research contributes to the limited body of research aimed exclusively at the education of older adults and focus on a new area of understanding, decision-making. This

study seeks to discover more about retired learners and build on the existing base of literature in the fields of adult education and educational gerontology. It is anticipated that the discoveries from this study will assist agencies, organizations and community groups who offer educational programs for the retired to better understand what factors are important when selecting an educational program. This qualitative investigation hopes to open the door to understanding the decision-making process and lay the foundation for my doctoral study which will quantitatively examine, in greater detail, the decision-making process.

Definitions

At what age does one become an *'older adult'*, an elderly member of society? A variety of definitions exist in the literature to describe adult learners, the majority of which reflect two main ideas: (1) completion of one's formal education, and (2) being responsible for activities which are deemed *'adult'* in a given cultural context. Neither concept seems relevant here. In Canada, a person becomes eligible to claim pension benefits at age 65. So, just as one becomes an adult at age 18 in our society, at age 65 in Canada, at least for governmental purposes, one becomes a senior citizen. While this definition holds true today, the phenomena of early retirement and increased redundancies of people in their 50's is causing society to rethink the definition of aging. In synchrony with Elderhostel Inc.'s age eligibility policy, the term older adult in this study refers to people aged 55 years and older.

Wolfe (1994) coined the expression *"semantic gymnastics"* to describe the multitude of labels marketing professionals use to identify people who have retired, or plan to retire. Seniors, senior citizens, the elderly, the well elderly, elders, older adults, mature adults, 55+, prime lifers, emeritians, third agers, veterans, golden oldies, the new senior, PLY's [person's in their later years] have all been used to describe this population. While there appears to be no consensus in the literature, it is clear that many of the labels used to describe mature adults reflect an age bias which, according to Wolfe, is not always appreciated. As the purpose of this study is not to resolve this semantic challenge, a variety of descriptors are used with sensitivity to the aging issue.

Summary

This chapter has introduced a new paradigm of aging and described certain demographic characteristics of aging world population. Tomorrow's senior citizens will set new trends and shape society in ways yet unknown (Gartner, 1996). The third age will consist of older adults who enjoy better health, a longer life, greater financial security, and retire with higher levels of education than any previous generation (Thornton, 1992; Foot, 1996). The data may indicate that society is getting older, but the elders themselves are getting younger (van Harssel, 1994)!

In an aging society it is vital that we understand the needs of mature adults. Research that supports and enhances our knowledge of learning interest in retirement and how decisions are made, will contribute to the small, but growing body of literature focussed exclusively on persons in their later years. To be effective and pro-active, a harmonized effort between the research community, educators, providers of educational programs, and senior citizens will be required to prepare for the challenges that lie ahead.

Organization of the Study

The review of the literature, Chapter II, examines the social context for adult education, the conceptual framework and research traditions which guide this investigation. Chapter III discusses the theoretical framework for the study and describes both the original research design and the evolution of the research design which occurred while collecting data. Chapter IV and Chapter V present the findings of the study. The fourth chapter concentrates on the decision-making criteria and their sequencing, the fifth chapter presents the participant typology. The sixth chapter discusses the findings, shares lessons learned, and considers future opportunities.

Chapter II

Review of the Literature

The path to understanding winds like a river. As it meanders, the river gains strength from the mountains, sources within valleys, and tributaries along the way. And like the river, our effort to understand adult learners winds a path that gains strength from the knowledge gained through previous research. By examining earlier studies, in consideration of their social context, we begin to see how the river bends and understand the forces that cause it to meander.

The purpose of this chapter is to review and synthesize the literature that informs this study. Anderson (1990) writes that a literature review is designed to summarize, analyze, and interpret the conceptual and theoretical research related to a research project. When I began this study I didn't fully understand the implications of Anderson's words, I do now! It has been a struggle to develop a chapter which does justice to the available resources; resources which have helped shape the study, enrich the data collection and analysis, and strengthen my understanding of the findings. Reviewing the literature has been a continuous activity and, like emerging themes in qualitative research, it is only in reflection that I can step back from the material and fully understand how the literature has guided and informed this study.

This literature review is presented in three sections. The first section examines the evolution of the social context for adult education. The second section concentrates on the conceptual framework, the theoretical and practical traditions in adult education. The final section, research traditions, highlights the influence of two major research paradigms and reviews a number of quantitative and qualitative studies of older adults in education.

The Social Context

The interest, research, and speculation on the motives of adults who participate in education has spanned five decades (Romaniuk & Romaniuk, 1982). An impressive list of

researchers have examined various populations to describe, theorize, and provide models which explain why adult participate, or do not participate, in educational activities (Boshier, 1971; Boshier & Collins, 1985; Cross, 1981, 1992; Darkenwald & Merriam, 1984; Havighurst, 1969, 1976; Houle, 1961; Merriam & Caffarella, 1991; Morstain & Smart, 1974; Scanlan & Darkenwald, 1982). So why do another study? The social context for learning has changed, as have the opportunities in human science research. The way we view the world today is different than our forefathers and the role learning plays in our lives has changed. Today,

> life long learning is not a privilege or a right; it is simply a necessity for anyone, young or old, who must live with the escalating pace of change — in the family, on the job, in the community and in the worldwide society (Cross, 1992, p. xxi).

Unless we want the river-bed to run dry, it is our responsibility, as researchers, to ensure that investigations of current phenomena continue to create new tributaries of knowledge that feed into the main stream of understanding and give it strength.

The social context for adult education has changed throughout this century. The advent of computers, the global economy, increased immigration, women in the work-place, transient lifestyles, the introduction of new language laws, educational attainment, and the aging baby boom population, have all contributed to an increased need and interest in learning throughout the life-cycle (Cross, 1981, 1992; Darkenwald & Merriam, 1984; Foot, 1996; Jean, 1995; Merriam & Caffarella, 1991; Selman & Dampier, 1991).

Selman and Dampier (1991) provide a useful historical account of the evolution and primary purposes for adult education in the last 130 years. Prior to 1867, adult education was available on a scattered, informal, and voluntary basis. Formalized educational opportunities, for all Canadians, began between 1867 and 1914; then between 1915 and 1937, the adult education movement came into conscious existence. World War II had a significant impact on directing the learning needs of the adult population. "The wartime period mobilized Canadians to unaccustomed tasks on an unprecedented scale. Canadian men and women responded — and learned — as never before" (Selman & Dampier, 1991, p. 67). All levels of government became active, resulting in an extension

of adult education opportunities from the formal institutions (universities and colleges) to community and recreation centers. The activities in adult education during the years 1940 to 1959 were very distinct: support the war effort, educate immigrants, and create new services at the community level.

As the availability of adult education programs and services increased, a fundamental shift in adult education was afoot, the role of learning was slowly being redefined. Since the 1960's, and through to present times, there has been a gradual acceptance that "education must not be seen as a *preparation for life*, but as an ongoing part of life" (Selman & Dampier, 1991, p. 68). We have moved from associating adult education as a need, relevant only at certain times in a person's life, to accepting learning as a lifelong process; a process that taps multiple learning resources in society, as needs arise (Cross, 1992).

This is not to say that the old categories of learning no longer exist, they do. Formal learning still refers to structured and planned educational programs which prepare people for their life's vocation (university, college and vocational training). Non-formal education is also planned and organized, but it caters to the learning needs of a specific sub-group of the population. It is geared towards learning related to professional development, training and development, and personal enrichment. Informal education is recognized as the unplanned, unorganized learning that occurs in our daily lives, the largest part of the average person's education (Selman & Dampier, 1991). Whereas once these opportunities were viewed independent of one another, today these opportunities are viewed as components of the lifelong learning concept.

As we approach the next millennium, we are alerted by demographers of yet another social change on the horizon, an aging population. A population driven by the baby boomers who have, by virtue of their numbers, been setting trends and shaping society for years (Gartner, 1996). Foot (1996) warns that the educational systems must be pro-active and prepare for the learning needs of the aging. Historically, the field of education has run behind the demographic thrusts in society. Foot recommends that professionals, in all levels of the education system, recognize the inevitability of the

population shift, adjust resources as required, and prepare for a future which includes senior learners.

In my opinion, it is time to take advantage of the opportunities to study phenomena that exist in 1996. We must benefit from the use of qualitative research methods and new advances in statistical modeling made possible with computers. It is time to prepare for the new paradigm of aging and turn a percentage of our research efforts towards the mature members of our society. If we embrace lifelong learning as a fundamental concept, then we must expand on the populations traditionally studied in adult education — college and university, formal and non-formal programs — and reach deeper into the community, learn about how others are learning! It is time to move beyond listing motivational factors and examine how these factors influence choices made regarding educational experiences.

As I have already mentioned, a plethora of studies exist that profile certain populations and their participation motives. To illustrate, consider the lucky applicant who is accepted to Harvard, Oxford, and McGill University. We can probably safely answer the *'5W's'* — who the applicant is, why they want a university degree, what they wish to study, when and how they plan to study, and where they prefer to study. What we don't know is **how** the applicant makes their choice. What are the important selection criteria used to make the final decision and how are these criteria sequenced.

The **'how'** question is difficult to answer, even with an adult in their 20's, a cohort well researched in the adult education literature. Even less is known about the growing number of seniors in society. What are the criteria for selecting an Elderhostel program versus an evening class at an Institute for Retirement in Learning, or enrolling in a course at the local community center. This study aims to start a new tributary of knowledge, one focussed on understanding the decision-making process of older adults in education. A tributary which is both relevant and responsive to the world we live in today.

The Conceptual Framework

The conceptual framework in adult education has been driven by two dominant traditions, one theoretical and the other practical. The way we studied participation and motivation in adult education during the 1950's through the 1970's was strongly influenced by the fields of psychology and behavioral psychology and guided by a *'scientific'* search for the truth. Decades of human science research have focused on trying to find the *'answer'*. It was believed that if we could isolate certain attitudes, attributes, or motives, we could understand the phenomena under study, affect or effect change, and generalize findings to the population at large. There is one fundamental problem with this sterile, scientific approach. In adult education we study human beings, people with a life time of experience and an internal complexity beyond simple numeric description. None-the-less, for decades variables have been isolated, research findings statistically manipulated, and the results labelled in ways designed to simplify and enhance our understanding of phenomena under study the human science.

Hierarchies and continuums are two ways to simplify and share theoretical knowledge. Maslow's Hierarchy of Needs (1954), Bloom's Taxonomy (1956), and Havighurst's Expressive-Instrumental Continuum (1969), are a few examples of studies which have impacted our understanding of motivation, cognitive learning, and learning needs. And while these theories helped shape our basic understanding, they have limited practical value. Since the 1960's, researchers have used typologies and classification schemes to organize findings. These methods have a higher pragmatic value for they can be applied to general knowledge or focus on a specific population. The next part of the literature review examines several influential studies that have reported their findings using a hierarchy, continuum, typology, or classification scheme.

Hierarchies and Continuums

A hierarchy, quite simply, is a **rank ordering**. In the military for example, you have privates at the bottom of the hierarchy, generals at the top. In the Catholic church you have the parishioners at the bottom, and the Pope at the top (of the physical world).

The critical assumption here is that in order for a person to climb up the hierarchy, he or she must first step on each lower rung of the ladder before reaching the top.

Two hierarchies have been influential in education. One of the most renown theories of motivation is Maslow's *Hierarchy of Needs* (1954) which orders five levels of human need according to their prepotency. The lowest need is physiological, followed by safety, belongingness and love, self worth and achievement, and finally, self-actualization. Maslow believed "what a man can be, he must be" (p. 91), but in order to fulfill one's potential and achieve self-actualization, the lower needs first must be met. The *Hierarchy of Needs* theory has received a great deal of attention and prompted several researchers to challenge the theory and test alternative hypotheses. Several alternate, non-hierarchical theories of motivation were developed as a result, each providing a unique contribution to our understanding of motivation. Four studies from the 1950's and 1960's frequently cited include the *Motivation-Hygiene Theory* (Herzburg, Mausner & Snyderman, 1959), the *Acquired Needs Theory* (McClelland, 1961, 1965), the *Expectancy Theory* (Vroom, 1964), and the *Goal Path Theory* (Locke, 1968).

Bloom's Taxonomy (1956), has been of particular use in understanding how adults process cognitive information. This taxonomy, which Cranton (1994) describes as a hierarchy, lists six levels of cognition: knowledge, comprehension, application, analysis, synthesis, evaluation. Like any hierarchy, content from the lower levels must be learned before a learner can advance up the ladder to more sophisticated ways of processing knowledge.

A continuum, on the other hand, **places concepts at opposite ends of a theoretical line**, concepts which are subsets of a whole but exist in opposition of each other. For example, consider behaviour as a universal set. Within this set there are good behaviors and bad behaviors. Strung in opposition, a person can move incrementally in either direction. The built-in assumption of a continuum is of course, that one cannot be both good and bad at the same time. Continuums are everywhere (right and wrong, new and old, happy and sad) and in certain cases are very effective. Unfortunately, if the concepts are not truly mutually exclusive, continuums can be of limited value or rendered useless. A case in point is Havighurst's Expressive-Instrumental Continuum (1969).

Havighurst (1969, 1976) has done extensive research to examine education throughout the life-span. He asserts that education (the universal set) contains two educational subsets, instrumental and expressive. **Instrumental education** relates to an external educational goal, one that rests outside and beyond the act of education, used as an instrument of change. We learn a second language to communicate with others, we seek a university degree to obtain a better job. **Expressive education** on the other hand is "education for a goal that lies within the act of learning, or is so closely related to it that the act of learning appears to be the goal" (Havighurst, 1976, p. 42). A person learns to dance, not to become a prima ballerina, but to have fun with friends. And although Havighurst cautioned that the distinction between these two concepts should not be taken to far, the *Expressive-Instrumental Continuum*, as it is now known, has been tested by several researchers, and the results are varied.

Hiemstra (1976) used trained interviewers to gather data from 256 people, aged 55+, to examine the instrumental vs expressive learning activities of older adults. These individuals were randomly selected from voter registration cards in two rural Nebraskan communities. The instrument, a list of 32 courses, was tested for construct and concurrent validity. Participants were asked to indicate which courses they would prefer to follow, if given the opportunity. The results were divided into two groups and compared using chi-square. Hiemstra discovered a significant preference for instrumental learning in actual learning projects and courses, but stated that future research must still address the expressive - instrumental dichotomy. Hiemstra concluded that educational administrators should provide more instrumental learning opportunities for the adult participant.

Opposite results were found by O'Connor (1987) who also studied the learning goals of older adults, aged 60+, and discovered a preference for expressive learning. In this exploratory study, O'Connor surveyed 250 adults divided into three cohorts: mature adults (60+) attending college, middle aged adults (40 - 59 years) also attending college, and Elderhostel participants aged 60 years and older. O'Connor concluded that the distinction between expressive and instrumental goals were relevant to the respondents and that the goals of middle aged were more instrumental goals, with older adults the goals were more expressive goals. Two years later Wirtz & Charner (1989) surveyed 490

seniors, who had participated in educational courses since their retirement, and found that two thirds of their sample population reported both instrumental and expressive needs. Based on their results and the discrepancies in the past, Wirtz and Charner concluded that the continuum was a failure. They did agree however with O'Connor, that as concepts — expressive and instrumental orientations — warrant further investigation, however locating them in opposition along a continuum may not be plausible.

Classification and Typologies

Classifications and typologies are used to organize phenomena, facilitate communication, and reduce masses of information into manageable units of understanding. Classifications and typologies are similar, to the extent that they describe a group of characteristics, yet there is one fundamental difference. Classification schemes are constructed based on pre-determined criteria, whereas typologies emerge from the analysis of people, or from the analysis of multiple classification schemes.

The most celebrated typology in adult education is Houle's (1961) three way typology of the adult learner. Houle audio-taped in-depth interviews with 22 adults who,

> so conspicuously engaged in various forms of continuing learning that they could be readily identified for me by their personal friends or by the counselors and directors of adult education institutions. Otherwise they vary widely in age, sex, race, national origin, social status, religion, marital condition and level of formal education (p.13).

In his analysis Houle commented that many early analyses proved useless, until one day the essence of three subgroups appeared in the data. These he labelled: goal oriented learner, the activity oriented, and the learning oriented (Houle, 1961, p. 15). Goal oriented learners were characterized as people in pursuit of specific, clear-cut objectives who first identified a learning need, then selected an appropriate vehicle to satisfy their goals. In contrast, activity oriented learners participated primarily for the enjoyment of the activity itself. The educational institution was seen as a socially acceptable meeting place, and often there was no connection between the course selected and the reason for enrolling. Finally, learning oriented individuals sought knowledge purely for the sake of knowing.

They differed from goal and activity learners in that each learning activity had a specific goal which was satisfied through a continuous range of learning experiences that made the total pattern of participation far greater than its parts.

Houle's parsimonious typology "remains the single most influential motivational study today" (Cross, 1992, p.82) and has stimulated a tremendous number of researchers to affirm or refine his original categories (Boshier, 1971; Boshier & Collins, 1985; Cross, 1981; Carp, Peterson & Roelfs, 1974; Morstain & Smart, 1974). Three decades later, Cross (1992) concludes that subsequent studies have illuminated, rather than changed the original typology. Boshier and Collins (1985) caution, that although practioners and professors still refer to goal, activity, and learning orientations, the research of the past years has informed us that these categories are more complex than first envisioned by Houle.

The use of typologies has not been restricted to education. Levinson (1978), with his intellectual roots in sociology, psychology and psychiatry, used typologies to understand the life cycle and stages of adult development. Similar to Houle, Levinson used a highly diverse sample of 40 men who he interviewed several times over a two year period to explore their lives. It was through the stories of these men that Levinson was able to construct his theory of adult development. Gail Sheehy, Levinson's protégée, collected and analyzed 115 life stories from middle class men and women, then in 1974, published her results in *Passages* (Sheehy, 1974). This book went on to become a best seller. Eleven years later, based on extensive research, Sheehy reconstructed her original typology, and again published her results in a second best selling book: *New Passages: Mapping Your Life Across Time* (Sheehy, 1995).

The use of typologies are more prevalent in marketing and consumer research, where "one of the first tasks in marketing planning is to divide the market into relatively homogeneous segments" (Beckman, Kurtz & Boone, 1982, p. 13). These sub-divisions of the target market can be based on common characteristics, behaviors, or attitudes. Meredith & Schewe (1994) identify two benefits of homogeneous segments: to understand and reveal the underlying mind-set people hold towards various services, programs, or products, and to develop advertising campaigns aimed at a specific group,

without offending members within that same group. Holt (1995), a consumer researcher, claimed that whether the classification for the typology is based on how objects are used and their shared meaning, or based on the way people experience a product of program, typologies are useful.

Houle (1961) and Sheehy (1974, 1995) have demonstrated the power of typologies. Typologies enhance understanding, bring simplified meaning to complex phenomena, and stimulate further research. The simplicity of a typology is part of its beauty; its creation, a result of emergent themes from the voices of people.

By far the largest number of investigators who study adult participation and non-participation in education use **classifications** to synthesize their findings. One of the most enduring and psychometrically defensive instruments, the *Educational Participation Scale (EPS)*, was developed by Boshier (1971) to test Houle's typology. It exists in two forms, the original instrument contains 48 items that details the reasons why adults are motivated to participate in education. Six years later, after intensive use, a 40 item revised instrument was produced (Boshier, 1977). Both instruments use a nine point Likert scale to indicate the influence of each motivational factor.

The original EPS (Boshier, 1971) was first used on a random sample of 233 adult students enrolled, at a high school, in a wide range of continuing education courses. The data was factor analysed, using a minimum factor load of .40. A first order factor rotation revealed 14 motivational orientations, a second order rotation refined this list to seven factors. These factors were then inter-correlated creating the final third order factor listing, and these factors became the foundation of the EPS classification. The seven categories are: (1) inter-personal improvement/escape, (2) inner versus other-directed advancement, (3) social sharing, (4). artifact (conformity), (5) self-centeredness versus altruism, (6) professional future orientedness, and (7) cognitive interest.

As a result of widespread use, the EPS has produced at least three different classification schemes. Morstain and Smart (1974) used the EPS to survey 611 American college adult education students. Their multi-variate analysis revealed six motivational factors: (1) social relationships, (2) external expectations, (3) social welfare, (4) professional advancement, (5) escape/stimulation, and (6) cognitive interest, one less than

Boshier. That same year, Carp, Peterson and Roelfs (1974), in their national study for the Commission on Non-traditional study (CNS), used the EPS, and in their report listed nine major factors. Seven of these factors concurred with Burgess (1971), and two were added: desire for personal fulfillment and desire for cultural knowledge.

Classifications are also used in studies of non-participation in adult education. Johnstone & Rivera's (1965) study provided the bedrock upon which several other researchers have helped to build up our understanding of the non-participant. Johnstone & Rivera's study revealed two types of deterrents, situation and dispositional. Situational deterrents relate to external factors such as personal finance, availability of child care, and spare time. Dispositional deterrents relate to internal attitudes about education which impede participation. A third classification, institutional deterrents, (such as restrictive locations, the scheduling of classes, pre-requisites, and the time required to complete a program) was added by Cross (1981). Finally, Darkenwald and Merriam's (1984) research concurred with situational and institutional barriers, and introduced a fourth barrier — informational barriers — the failure of institutions to adequately communicate information to participants and the failure by participants to seek out the information they require.

The Conceptual Framework Summary

This section of the literature review has examined studies that use hierarchies, continuums, typologies, and classifications to share their findings. The studies that have had a considerable influence on stimulating further research include Houle (1961), Havighurst (1969), and Boshier (1971). The sample populations of the studies presented in this conceptual framework come from the general field of adult education. The final section of the literature review, research paradigms and traditions, shifts the focus to studies of the older adult in education. A more specific focus, relevant to this inquiry.

Research Paradigms and Traditions

Paradigms represent our fundamental beliefs and therefore have an influence on the way we investigate phenomena. Paradigm issues are crucial and researchers must be clear about which paradigm informs and guides their approach (Guba & Lincoln, 1994). The literature reviewed thus far in adult education has been guided by two research paradigms, each with a strong history and research tradition.

The **positivist paradigm** is "the backdrop against which other paradigms and perspectives operate" (Denzin & Lincoln, 1994, p. 99). Grounded in the assumption that *'one truth'* exists, positivist research applies four criteria to inquiry: internal validity, external validity, reliability and objectivity. Commonly known as scientific or quantitative research, Kerlinger (1986) defines this form of inquiry as the "systematic, controlled, empirical, and critical investigation of natural phenomena guided by theory and hypotheses about the presumed relations among such phenomena" (p. 10). The roots of this research paradigm and its associated methodological traditions dig deep into the research community, and while this may be an appropriate way to investigate certain phenomena, such as mathematical science and engineering, it is not always best suited to human science research.

The **qualitative research paradigm** provides an alternative view of the world. Advocates of this paradigm embrace *'multiple realities'* and acknowledge that the researcher is unable to separate him or herself from the research experience. Denzin and Guba (1994) describe qualitative research as being,

> Multi-method in its focus, involving an interpretive, naturalistic approach to its subject matter. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them (p. 29).

Qualitative research collects data via case study, interviews, observation, life stories, and personal experience. Then through the analysis of emergent themes, constructs are developed, interpreted, reflected upon and finally, the findings are written and shared.

Quantitative Research

The majority of the research into the participation motives of adults and older adults in education is quantitative. These studies sample a variety of ages and use original questionnaires or scientifically tested instruments to collect data from various populations that range in size from 59 participants (Roberto & McGraw, 1990) to 13,442 participants (Boshier & Collins, 1985). The statistical tests applied to the data include: descriptive statistics, cross-tabulations, chi-square, t-tests, f-tests, z-tests, correlations, and factor, multi-variate, discriminate, multiple-regression, and cluster analysis. Appendix A presents a synthesis of studies reported in this section, including the instrument, number and age of participants, and the statistical tests used.

Often cited in the research of older adults in education is *The Participation Motives of Older Adults in Higher Education: The Elderhostel Experience* (Romaniuk and Romaniuk, 1982). This comprehensive survey of 498 Elderhostel participants ($\bar{x}$ = 67 years) examined fourteen motives associated with the decision to attend Elderhostel and investigated the difference between new and return participants. The survey instrument contained four sections: (1) factors related to the decision to attend Elderhostel, (2) evaluation of the program's organization, (3) evaluation of the individual courses attended, and (4) demographic information. The data was examined using descriptive statistics and discriminant analysis. Romaniuk and Romaniuk listed that the decision to attend Elderhostel was most strongly influenced by: learning content, new experiences, catalogue course descriptions, visiting a new place, meeting new people and time of year. They also discovered differences between the new and return participant. New participants were primarily motivated by the initial low cost investment, being close to home, and travelling with a companion. Return participants were motivated by the underlying features of the program itself, learning something new and traveling to new places.

The desire to learn and enjoy new experiences were also reported by Rice (1986) who examined the motivation of 458 Elderhostel participants in Atlantic Canada. She found learning and new experiences rated in second and third place, travel and visiting a

geographical area rated first. Swedburg (1991b) on the other hand concurred with Romaniuk and Romaniuk's first two motivations. He found, in descending order, the most important factors related to the courses and meeting people, followed by travel and location, then cost.

Brady and Fowler (1988) examined Elderhostel participants from a different perspective, they focussed on the learning factor. Their survey of 560 Elderhostel participants, examined self-reported learning outcomes. A comparison, using multiple regression analysis, revealed that setting clear learning goals, building on previous experience, and choosing programs because of the specific curricula had the strongest influence on learning outcomes.

A more recent quantitative study, relevant to this investigation, is Henry and Basile's (1994) *Understanding the Decision to Participate in Formal Adult Education.* Although the sample population was again younger adults, students in their thirties, it is the only study I found that focused on understanding the decision to participate in adult education. Henry and Basile examined this phenomena using two different random samples. The first was a group of 138 students enrolled in 17 different adult education courses. The second sample consisted of 180 people who had inquired about courses but never registered. Both samples were issued the same questionnaire that listed reasons to enroll and sources of information. A Likert scale measured the importance of institutional perception, the importance of course attributes, and the deterrents to participation. Using descriptive statistics to analyse the demographic profile, Henry and Basile found slight differences between participants and non-participants. A logical regression analysis was used to examine how the responses between the two samples differed. Henry and Basile concluded that the variables which differed the most between these two groups were: (1) to meet people and get out of the house, (2) general interest, (3) paying your own fees, (4) brochure sent to work, (5) major life changes, and (6) institutional deterrents. The #1, #2, #3, #5 and #6 variables were reported to increase the odds of non-participation. It is interesting to note that Henry and Basile found social factors and general course interest

to have a negative effect on participation, where all other studies I reviewed, that sampled participant populations, the social and course factors encouraged participation

The bulk of adult education research, with the exception of Houle (1961), has been quantitative. This is unfortunate for as Cross (1992) confirms,

> The recent tendency of researchers to depart from qualitative analyses of interview profiles in favour of quantitative presentation of data should be viewed, I think, as a dubious contribution to research. Our understandings are enhanced by variety in research methodology. The subjective insights possible with in-depth interviews contribute something *different* [sic] from the quantification of data, which is a primary strength of survey research (p. 88).

Since the 1990's a few qualitative studies have emerged in the study of older adults in education. The focus now turns to these studies.

Qualitative Research

Wolf (1990), using an exploratory research paradigm, interviewed 40 Elderhostel participants (aged 60 - 80), and recorded their personal stories. Content analysis was used to develop themes and reflected on their meaning within a psycho-social and gerontological framework. Wolf reported that the quality of life for elders can be greatly enhanced through education. Of the stories she profiled, the reasons for pursuing educational courses included: personal interest, the need to contribute, and fulfill a lifelong dream.

Murk (1992) used a case study to illustrate and describe an Elderhostel site at Ball State University, Indiana. This study, informed by multiple data sources, describes the program and identifies that the reason Elderhostel participants choose Ball State is because of its location, campus setting, courses, proximity to friends or family, and curiosity. These findings are consistent with previous Elderhostel researchers (Bradley & Fowler, 1988; Romaniuk & Romaniuk, 1982; Swedburg, 1991b; Rice, 1986).

And finally, Adair and Mowsesian (1993) examined the meaning and motivations of learning during the retirement transition. This qualitative phenomenological inquiry used a grounded theory methodology. Selective sampling, using the dimensions of time

and identity, were used to locate individuals, aged 55 years or older, who defined themselves as being retired. Thirty participants were screened, seven were selected. Each participant engaged in two in-depth interviews, a three to five hour time commitment. The interviews were guided by *'how and why'* questions. The analysis examined the data using Havighurst's (1964) definitions of expressive and instrumental learning. Adair and Mowsesian discovered that the instrumental learning needs of their participants related to health, finance, and social support. Expressive learning needs related to personal identity, competence, meaningful and purposeful activity, and affiliation. They concluded that it is not always possible to separate expressive and instrumental needs, for these constructs have different meanings to different people.

Summary of the Research Traditions and Paradigms

This section of the literature review has presented both qualitative and quantitative studies related to older adults who enrol in educational programs. The list of participants' motives in adult education are as vast and complex as the people who enroll. Romaniuk and Romaniuk (1982) wrote that despite the different dimension labels and definitions used in various studies, eight general categories can be identified. After reflecting on their eight categories and the studies I reviewed in this chapter, I constructed Table 2.1 to help aid in synthesizing the factors presented in this chapter. The listing is not intended to be exhaustive, but representative of the major factors identified in various studies. You will note that Houle (1961) is not included for, as Darkenwald and Merriam (1984) highlight, Houle's typology was based on the identification of a type of person, not motivational factors.

Table 2.1 ***Adult and Older Adult Education Motivation Factors***

	Factor Label	Author, Date	
#1	Interest in gaining new knowledge	Boshier, 1971 Burgess, 1971 Morstain & Smart, 1974 Havighurst, 1976 Cross, 1981, 1992 Rice, 1986	O'Connor, 1987 Brady & Fowler, 1988 Wirtz & Charner, 1989 Roberto & McGraw, 1990 Swedburg, 1991 Adair & Mowsesian, 1993
#2	Instrumental reasons	Boshier, 1971 Burgess, 1971 Morstain & Smart, 1974 Havighurst, 1976 Hiemstra, 1976 Cross, 1981, 1992	Heisel, Darkenwald & Anderson, 1981 Wirtz & Charner, 1989 Roberto & McGraw, 1990 Adair & Mowsesian, 1993 Henry & Basile, 1994
#3	Social interaction	Boshier, 1971 Burgess, 1971 Morstain & Smart, 1974 Heisel et al., 1981 Romaniuk & Romaniuk, 1982	Rice, 1986 Roberto & McGraw, 1990 Swedburg, 1991 Henry & Basile, 1994
#4	Escape	Boshier, 1971 Burgess, 1971 Morstain & Smart, 1974	Cross, 1981, 1992 Rice, 1986 Henry & Basile, 1994
#5	Personal achievement	Burgess, 1971 Cross, 1981, 1992 Brady & Fowler, 1988	Heisel, et al., 1981 Wolf, 1990 Henry & Basile, 1994
#6	Age, sex and educational attainment are related to the courses older adults choose	Heisel et al., 1981 Pearce, 1991	Thornton, 1992
#7	Guided by institutional information	Romaniuk & Romaniuk, 1982	Brady & Fowler, 1988
#8	Institution: reputation	Romaniuk & Romaniuk, 1982	Brady & Fowler, 1988
#9	Try something new	Romaniuk & Romaniuk, 1982	Roberto & McGraw, 1990
#10	Travel	Romaniuk & Romaniuk, 1982 Rice, 1986	Swedburg, 1991b
#11	Cost	Roberto & McGraw, 1990 Swedburg, 1991b	Henry & Basile, 1994
#12	Major life changes	Cross, 1992	Henry & Basile, 1994

Table 2.1 ***Adult and Older Adult Education Motivation Factors***

	Factor Label	Author, Date
#13	Reach a religious goal	Burgess, 1971
#14	Experience with program	Brady & Fowler, 1988
#15	Desire to be a better citizen	Cross, 1981, 1992
#16	Enhance quality of life	Cross, 1981, 1992
#17	Recreational	Cross, 1981, 1992

A Position Statement

Qualitative and quantitative research methods provide different ways to view the world. As research paradigms, they have different epistemological, ontological and methodological approaches to studying phenomena. The debate over which method of inquiry best informs, will continue. Some will argue the positivist position, some the qualitative position, still others will argue for an integration of these two methods (Patton, 1990). Gall, Borg, and Gall (1996) write that some researchers believe that qualitative research is best used for inductive research purposes, to uncover themes and relationships; quantitative research is best used for deductive research, to validate and test hypotheses derived from the preliminary inductive inquiry. Anderson (1990) believes that researchers must be flexible and allow the needs of the investigation to drive the choice of research methods; first define the questions, then select the most appropriate method to investigate. In contrast, Denzin and Lincoln (1994) believe researchers must first state their research paradigm, then select methods to investigate within that framework to examine phenomena.

I agree with Anderson, the needs of the inquiry must drive the investigation and once the questions are defined, the researcher is then in a position to decide which research design and methods of data collection can best answer the question. I also believe in the merits of an integrated paradigm, a *'paradigm of choice'* (Patton, 1990), which accepts that research can benefit from both qualitative and quantitative research methods

to bring understanding to phenomena. This study examines the decision-making process of Elderhostel participants and seeks to establish a participant typology based on these findings. As the study of decision-making is in its infancy, indeed I could only locate one study in the area, and no one to date has presented a typology of the older adult learner, this investigation can benefit from the paradigm of choice. What is first required is an inductive, qualitative inquiry to explore how participants make their decisions, identify the criteria, and gain an appreciation for how factors are sequenced. Once completed, quantitative methods can then be used in the subsequent study (Ph.D. research) to test the hypotheses and analyze the decision-making process in greater detail.

Summary of the Literature Review

This literature review has tried to illustrate how adult education research has been influence by social context, traditional and practical conceptual frameworks, and research paradigms and traditions. As I review the history, consider the social context, and reflect on the research traditions, I realize that most of the research to date is focused in one area, quantitative research based on adult populations and relatively large samples. Very few qualitative research studies exist (Table 2.2).

Table 2.2 Adult Education Research History

Adult Education Research	**Adults (18 - 54)**	**Older Adults (55+)**
Quantitative Tradition	Majority of Research	Limited Research
Qualitative Tradition	Scant Research	Scant Research

We have come though a long tradition of scientific research, which was appropriate considering the social context of its time. But as Brookfield (1986) criticizes,

the sampling frames tend to focus on adults in continuing education programs, a focus which is too narrow, considering the lifelong learning needs of all adults and the wide range of educational programs outside a university and college setting. And as Cross (1992) points out, one of the problems with quantitative research is that when researchers set out to test a hypothesis, they are likely to find what they are looking for! A summary of the literature reviewed is presented in Table 2.3.

In closing, I would like to add four personal observations: (1) there is very little research that investigates the differences between new and return participants; (2) only one study was found that examined the decision making process in adult education; (3) Houle's typology of the adult learner has been extremely powerful, yet no one researcher to date has investigated if a typology for mature learners exists; and (4) there is a shortage of qualitative investigations. We must learn from our past, but we live in the present. Given the opportunities that exist today, I believe it is time to move on. It is time to prepare for the new paradigm of aging, investigate the educational needs of the growing number of mature citizens in our society, and take advantage of the research opportunities which exist today.

Table 2.3 ***Summary of the Literature Reviewed***

	Contribution	Author, Date
I. *The Social Context*		
	Definitions and Boundaries in Adult Education, Functions and Philosophical Considerations, The Canadian Movement in Context	Selman & Dampier, 1991, pp. 1-69
	The Context and Environment of Adult Learning	Merriam & Caffarella, 1991, pp. 1-56.
	Social Context of Life Long Learning, Philosophy and Adult Education	Darkenwald & Merriam, 1984, pp. 1-74.
	Growth of a Learning Society	Cross, 1992, pp. 1-31.
	Adults as Learners	Cross, 1981
	The global classroom: Highlighting the needs of older adults	Jean, 1995
	The impact of the baby boomers	Gartner, 1996
	Profiting from the demographic shift	Foot, 1996
II. *Conceptual Framework*		
Hierarchy	Hierarchy of Needs	Maslow, 1954
	Bloom's Taxonomy	Bloom, 1956
Motivational Theories Influenced by Maslow's Hierarch of Needs	The motivation-hygiene theory	Herzburg, 1959
	The acquired needs theory	McClelland, 1961, 1965
	The expectancy theory	Vroom, 1964
	The goal path theory	Locke, 1968
Continuum	Expressive-Instrumental Continuum (EIC)	Havighurst, 1969, 1976
	Examining older adult learning goals using EIC	Hiemstra, 1976 O'Connor, 1987
	Revising the EIC with older adults	Wirtz & Charner, 1989

Table 2.3 ***Summary of the Literature Reviewed***

	Contribution	Author, Date
Typology	3-way typology of the adult learner	Houle, 1961
	A discussion of Houle's Typology	Cross, 1992, pp. 82-88, 96
	Theory of adult development	Levinson, 1978
	Passages and stages in life	Sheehy, 1974, 1995
	Use of typologies in market research	Beckman, Kurtz & Boone, 1982, pp. 13-14.
	The power of cohorts	Meredith & Schewe, 1994
	Typologies as a consumer classification scheme	Holt, 1995
Classification	Situational and dispositional deterrents	Johnstone & Rivera, 1965
	Reasons for Educational Participation Scale	Burgess, 1971
	Educational Participation Scale	Boshier, 1971
	Reasons for participation in adult education courses	Morstain & Smart, 1974
	Reasons for participating in non-traditional study	Carp, Peterson & Roelfs, 1974
	Motivational orientations revisited; life-space motives and the EPS	Boshier, 1977
	Barriers to participation	Cross, 1981 Cross, 1992, pp. 97 - 108 Darkenwald & Merriam, 1984, pp. 136 - 146
	Used the deterrents to participation scale (DPS) to explore the underlying structure for non-participation	Scanlan & Darkenwald, 1984
	Houle's three-way typology after 22 years using the EPS	Boshier & Collin, 1985
	Understanding the decision to participate	Henry & Basile, 1994

Table 2.3 ***Summary of the Literature Reviewed***

	Contribution	Author, Date
III. *The Quantitative Research Tradition*		
	Research Methods	Kerlinger, 1986 Anderson, 1990 Patton, 1990 Denzin & Lincoln, 1994 Guba & Lincoln, 1994 Gall, Borg & Gall, 1996
	Analyze participation patterns of older adults	Heisel, Darkenwald & Anderson, 1981
	Critical decision motives for new and return participants to attend Elderhostel	Romaniuk & Romaniuk, 1982
	Used the deterrents to participation scale (DPS) to explore the underlying structure for non-participation	Scanlan & Darkenwald, 1984
	Houle's three-way typology after 22 years using the EPS	Boshier & Collins, 1985
	Predictors of participation in educational activities by older adults	Fisher, 1986
	Motivation to participate in Atlantic Canada	Rice, 1986
	Perceived life satisfaction in relation to attitudes and skills associated with self directed learning	Brockett, 1987
	Predictive relationship between participation and learning outcomes	Brady & Fowler, 1988
	Identified course selection motivation factors	Roberto & McGraw, 1990
	Participation of older adults in continuing education	Pearce, 1991
	Older adult learning activities	Henry & Basile, 1994
IV. *The Qualitative Research Tradition*		
Life-stories	Motivation and expectations of older adults	Wolf, 1990
Case	An Elderhostel case study	Murk, 1992
In-depth Interviews	Learning as a strategy to negotiate retirement	Adair & Mowsesian, 1993

The Research Questions

The purpose of this study is to gain understanding about how older adults, who are retired or contemplating retirement, make decisions regarding their educational experiences. Together, with Elderhostel participants, this study seeks to establish a typology of the older adult learner based on five research questions:

1. What factors influenced the participants decision to select Elderhostel as an educational venue?
2. What factors influenced the participants choice of a specific Elderhostel program?
3. How are the decision-making factors sequenced and prioritized in the minds of the participants?
4. Does the order of the decision-making factors change with each program registration, or do they remain the same?
5. Do certain types of Elderhostelers make similar program choices?

Chapter III

The Theoretical Framework and Research Designs

The purpose of this chapter is to discuss the theoretical framework and present the methodological framework, first as it was conceived, then as it evolved in the life-world, the world of lived experience (van Manen, 1990). I remember a colleague once commenting; life is what happens between a plan, and this certainly holds true in the world of qualitative research. Because qualitative research does not occur in a vacuum, it is set in the natural world, certain events caused the original research plan to change. These changes in turn had an impact on the study and played a vital role in the research lessons learned.

The Theoretical Framework

"Qualitative research has a long and distinguished history in the human disciplines" and attempts to understand phenomena through the use of empirical evidence garnered from natural settings (Denzin & Lincoln, 1994, p. 1). Qualitative research also accepts and embraces the existence of multiple realities and acknowledges that the researcher, who is unable to separate himself or herself from the research, is an integral part of the experience (Eisner, 1991). It is an inductive approach to research that argues the natural environment is a fitting laboratory for understanding human processes. In qualitative research, topics may be explored without a pre-determined hypothesis and it is accepted that theory will emerge from fieldwork and data collection experiences (Denzin & Lincoln, 1994; Glasner & Strauss, 1967; Patton, 1990).

Phenomenology is a branch of qualitative research that asks "what is the meaning of something". The goal of phenomenology is to explain or describe life experiences as they occurred. As it is intersubjective, the researcher must develop a dialogic relationship with the phenomenon to validate what is being described. There is no hidden political agenda nor any attempt to persuade the reader toward one belief or another. It is purely an attempt to accurately represent the experiences of the observed. The goal of the

phenomenological researcher is to write captivating, yet accurate, descriptions of human activity, behaviour and experiences as they occur in the life-world. German philosopher Edmund Husserl (1859-1935) spent his life developing and refining this approach to studying human sciences. "His guiding belief was that to understand human phenomena we need to put aside our established views and assumptions and learn to 'see' things as they present themselves in our experiences and to 'describe' them in their own terms" (Preibe, 1993, p. 50).

The branch of phenomenology known as hermeneutic phenomenology, dates back to the interpretation of ancient Greek legends and asks the question "what are the conditions under which a human act took place or a product was produced that makes it possible to interpret its meanings?" (Patton, 1990, p. 84). The disciplinary roots of this branch of qualitative research are found in theology, literary criticism, and two branches of philosophy: that which **describes** phenomena — phenomenology — and that which seeks to **interpret** phenomena — hermeneutics.

Warnke (1987) broadly describes hermeneutic inquiry as a pedagogical process that seeks to exhibit the truth so that people can understand and learn from the findings. Van Manen's (1990) description, on the other hand, is more specific. He describes hermeneutic phenomenology as a human science that studies people and illustrates human phenomena through description, interpretation, and self-reflective analysis. The dialectic circle facilitates the creation of a shared perspective, the development of common constructs, and enhanced understanding. Warnke and Van Manen agree that the hermeneutic circle allows the researcher to step beyond description in explaining life experiences. This study is well suited to hermeneutic inquiry for, in attempting to understand educational decision making, one must go beyond merely listing the factors that influence the decision-making process and uncover the forces that shape them.

The Original Research Design

Selecting the Research Sites

Ten Elderhostel Canada program sites were selected using criterion sampling. The selection criteria included: (1) sites offering courses between 15 May and 30 June 1996, (2) geographic representation from five Elderhostel Canada regions, and (3) program diversity, a mixture of traditional classroom sites and field sites. Classroom sites were defined as locations where all three courses were held in the classroom. Field sites were defined as locations where the main program was taught outside a classroom. A third label, '*mixed*', was also used to identify sites where the catalogue description (Elderhostel Canada, 1996b) implied an even balance between field and classroom learning activities. The final selection of research sites (Appendix B) was done in consultation with the regional directors and national program director to confirm which sites would be the most, helpful, timely, and cost-efficient.

The Research Team

The research team consisted of two expert advisors, field assistants, and me. As the primary researcher, I was responsible for coordinating, planning and implementing the study, analysing and evaluating the data. The field assistants, staff and volunteers of ELDERHOSTEL Canada participated in many phases of the research: focus group training, coordinating sites, gate-keeper contacts, moderating focus groups, and providing feedback throughout the data collection period. Two expert advisors, Dr. G. Anderson from McGill University and Dr. R. Swedburg from Concordia University, worked in harmony to provide guidance, assistance, feedback, advice, and academic and organizational support.

Participant Selection

The volunteers for this study were participants registered at select ELDERHOSTEL Canada sites between 26 May and 6 July, 1996. Invitations to

participate in the study were extended during the welcome briefing. A site coordinator, field assistant, or myself explained the purpose of the study and the nature of the one hour volunteer commitment, then invited participants to sign up for one of two focus group discussions (one for individuals attending Elderhostel for the time in their life, the other, for return participants). A total of 154 Elderhostelers contributed their time to join the focus groups.

Data were also collected from 10 participants who agreed to an in-depth interview. While moderating the focus groups I listened to the stories of each participant, then selected people to interview who I believed could help confirm or contradict emerging themes and developing constructs.

Access and Entry Issues

Access and entry issues must be addressed by every qualitative researcher during the design phase of the study. To capture nuance and meaning from the participants "the researcher must establish trust, rapport and authentic communication patterns with participants" (Janesick, 1994, p. 211). Access to the British Columbia, Alberta, and Nova Scotia sites were arranged by the regional or the national program director, the person ultimately responsible for moderating the focus group. In Ontario and Quebec where my role was greater, introductions to the gate-keepers and arrangements to stay in residence at the sites, were done in concert with the regional directors of each province.

Data Sources and Collection Procedures

"Qualitative inquiry begins with the assumption that the perspective of others is meaningful, knowable, and able to be made explicit" (Patton, 1990, p. 278). To understand how older adults select their educational activities, it was imperative that the Elderhostel program participants have an appropriate forum in which to express themselves. Two strategies for collecting primary data were selected: focus group discussions and in-depth interviews. A small demographic questionnaire was also administered to gain information that would help locate the study volunteers within the larger Elderhostel participant population.

The Instruments

Three instruments were used in this study: two inquiry protocols, one questionnaire. The focus group protocol (Appendix C) and the in-depth interview protocol (Appendix D) were developed from the research questions. These focus group and in-depth interview protocols were evaluated by all members of the research team. The demographic questionnaire (Appendix E) was evaluated by both expert advisors on the research team. Revisions to all instruments were made based on this feedback.

Focus Groups

Focus groups are used for a very specific purpose in data collection. They are an effective means for gathering information about why people think or feel as they do and are useful when attempting to explain how people regard an experience, idea, or event. As a method to collect data, focus groups have become highly valued and widely used (Krueger, 1994). Additionally, the information derived from focus groups can assist a researcher sharpen his or her questions and move to more elaborate forms of research (Anderson, 1990).

Each focus group followed the same procedure:

1. At the welcome briefing a member of the research team would explain the purpose of the study, identify the sponsors, and describe the focus group discussion;

2. Seek 5 - 12 volunteers per focus group; and

3. At the start of each session, the moderator would:

    a) Introduce the moderator and assistant moderator;
    b) Describe the purpose of the study;
    c) Identify the sponsoring agents;
    d) Discuss ground rules for effective focus group discussions;
    e) Describe the participants rights and need for informed consent;
    f) Obtain written consent from all participants (appendix F);
    g) Distribute the demographic questionnaire;
    h) Ask for any questions prior to beginning;
    i) Start the audio recorder; then
    j) Begin with the first question.

In-depth Interviews

Identified as probably the most widely used form of collecting data in educational research, Anderson (1990) defines the interview as "a specialized form of communication between people for a specific purpose associated with some agreed subject matter" (p. 222). The purpose of an interview is to allow the inquirer to enter into and capture another person's perspective, to find out what is in and on their mind, and to discover that which cannot be observed. The interview is well suited to qualitative research and is essential to the hermeneutic process. Interviews provide a framework for the researcher to observe non-verbal cues, clarify questions, and probe answers while, at the same time, allow respondents to express their views, opinion, and comments.

Limitations

The use of focus groups and in-depth interviews have inherent weaknesses which must be acknowledged. These limitations, however, do not deter from their usefulness as a data collection technique. The weaknesses of focus groups include: (1) a limit on the number of questions a group can address in a short period of time, (2) the facilitator must be skilled with group processes, (3) taking notes can be difficult, (4) divisions, conflicts, or power struggles between respondents may emerge, (5) data analysis is difficult, (6) the groups may vary considerably, and (7) comments taken out of context may lead to erroneous conclusions (Anderson, 1990; Kreuger, 1994; Patton, 1990).

The limitations which arise during in-depth interviews include: (1) individuals have differing abilities to respond to questions and articulate responses, (2) the researcher's ability to assimilate and interpret data while conducting an interview, (3) interruptions or time pressures, (4) the comfort level of the participant, and (5) the rapport with the researcher (Anderson, 1990; Patton, 1990).

In addition to the above limitations, the use of multiple moderators in the focus groups and the ability to record the sessions impact the outcome. As well, as one cannot predict the degree to which participants will be able to articulate or share their experiences in a way meaningful to the research, it is always possible that a crucial piece of the story

may not be realized. Finally, the study may have limited success in finding predictable patterns on which to construct a typology of the older adult learner. While this would be a finding in itself, it would leave us with the continued challenge to find new ways to understand the mature learner.

Data Analysis

The analysis for this study followed Moustakas' (1990) five basic phases of phenomenological analysis: (1) **immersion** with the experience, (2) **incubation**, a time of quiet contemplation, (3) **illumination**, a time of increased awareness, expanded meaning and new clarity is brought to the study, (4) **explication**, new connections are made and the preparation to communicate findings begins, and (5) **creative synthesis**, the research findings and experience are wound together, prepared, and communicated.

Throughout the research process, field notes were written and when time permitted, transcribed onto computer disc. The focus group audio cassettes, flip chart notes, and field notes of the regional directors and their assistants were reviewed shortly after being received. The cassettes however, were not transcribed, until the data collection was complete. This was due to the time constraint of hosting multiple focus groups over a short period of time. Once the data collection was complete, a data base was created that contained field notes, transcribed audio cassettes, interview notes, and flip chart information. The demographic questionnaire was analysed using a standard computer analysis program [STATPAC]. The results are presented in Appendix G.

Early in the analysis, the data fell into three categories: (1) information directly related to the research questions, (2) information related to the methodology, and (3) information useful to ELDERHOSTEL Canada, but not directly relevant to decision-making. These three categories provided the initial base for categorizing the data. The first step was to review, understand, and report on the evolution of the research design. The second step was to separate information relevant and not relevant to the study. The third step was to triangulate the multiple data sources (focus groups, in-depth interviews, field immersion, and informal conversations with participants, regional directors and site

coordinators). Finally, the data was reviewed for negative cases and to confirm, restructure, merge or delete emergent themes. The data analysis was, as Yin (1994) so aptly stated, an activity which examined categories and combined evidence while addressing the initial purpose of the study.

The Evolution of the Research Design

Qualitative research is about people, individuals, groups of individuals, and cultures. It occurs in the life-world. The life-world is full of *'others'*, individuals not being studied but integral to the research process (ie. gate-keepers). The *'others'* exist in the periphery and their fingerprints, which touch the study, must be acknowledged for they represent certain realities of the life-world and mould the research experience. The purpose of this section of the document is to record important events, interactions, and unexpected challenges which caused the research design to evolve.

The Influence of *'Others'*

Research does not occur in a vacuum. Rather, it occurs in an ever changing world influenced by the actions, beliefs, and needs of individuals and organizations. Abstract realities, such as political and ethical challenges, come to bear on the research setting and yet, the study continues. Understanding these influences is critical so that lessons from the field may be learned and used to improve future research.

The fingerprints of four *'other'* Elderhostel stakeholders had an influence on this study: (1) national office staff, (2) regional directors, (3) site coordinators, and (4) site volunteers. Each group became involved in this investigation on a different level, at a different time, and for different reasons. This is natural. However, as the circle of multiple stakeholders increases, a new and important dimension comes into play, the political reality.

Formal and informal politics exist in all organizations and they are an integral component of organizational life. It would be folly to think that this influence would not

impact the research process. Individual beliefs about where the organization should be going, relationships between *'others'*, the commitment to participate, and feelings of enthusiasm, hope, frustration, and despair surfaced during the research process. And while none of these influences deterred from the purpose of the study, hearing the open, honest, and truthful remarks from various stakeholders rounded out my knowledge of Elderhostel, helped me to better understand what I was hearing from the participants. Together this had a positive influence on my ability to analyse the data and bring deeper meaning to the discoveries.

The Research Sites

Negotiating the research sites was contingent on three main variables: (1) the availability of the data collectors, (2) financial resources, and (3) the six week data collection time period. The major wildcards in this study were the willingness of the host site to participate, site cancellations (due to low enrollments), and differences in the resources available to the field assistants.

The goal of 10 research sites was obtained, however it was not possible to have two sites from the five regions, as originally planned. British Columbia, Ontario, Quebec, and the Maritimes each had two sites, the Prairies one. The site loss in the prairies was offset by the unplanned opportunity to include a site from a sixth region, the North. The original design did not include the North for financial reasons. However, when two members of the research team found themselves going on a business trip north, they quickly acted on the opportunity to schedule two focus groups. The goal of hosting 20 focus group discussions, two per site, also had to be modified because of conflicts with prescheduled activities at the sites and the number of interested participants. In the end 17 focus groups were hosted.

Access and Entry Challenges

Access to sites and entry upon arrival were influenced both by political and planning realities. As the study unfolded, four factors emerged that affected access to the

research sites. The first factor related to the degree to which local site coordinators welcomed the study. This partly related to the relationship between the site coordinator and ELDERHOSTEL Canada, at the time of the request. The second factor concerned the unwritten expectation that local sites or regions should absorb certain costs associated with the study. This caused everyone a great deal of discomfort. Third, the willingness of the site coordinator to schedule the focus groups into a demanding schedule and on short notice (> one month) was not always well received. Finally, my knowledge of the subject area at the site, and the degree to which I was able to join in the activities, strongly influenced my acceptance into the group. In Ontario, where the range of activities included classical music, golf, and genealogy, I joined in all activities available to the participants. This was well received, to the point where it was expected. Elderhostel participants have a very strong, unwritten set of social norms, and participation in their activities was crucial. In Quebec where the topic was jazz, I made a conscious decision to not take my trumpet, which in retrospect was an error, as the participants at this site were divided into two distinct groups: those who brought their instruments and *'jammed'* together, and those who did not. By electing to leave my trumpet at home, access to this group of musicians was severely restricted.

Recording the Data and the In-depth Interviews

In the original research design, it was planned that both the focus groups and in-depth interviews would be tape recorded. In addition, focus groups were to have an assistant moderator present to create a written record of the session, in the event the tape recording failed. However, despite great effort and the best of intentions, three out of seventeen sessions went unrecorded, four experienced severe auditory difficulties, and no assistant moderator was available for eight sessions.

The in-depth interviews posed another challenge. The majority of people approached to participate were reluctant to participate in a *'formal'* interview. Of those who agreed, permission to tape record the session was denied in all but two cases. Attempts to take discreet notes during the session made participants uncomfortable and

stifled the conversation, so the strategy was changed. The most successful approach involved mentally preparing for the interview, locating the person I wanted to speak with, usually at coffee time or before a meal, and then requesting permission to ask them a few questions. This less formal approach was far more effective, for I discovered it was extremely important to most participants, not to appear singled out. The invitation to participate in a one-on-one interview was not available to all, and this went against an unwritten Elderhostel social norm. The greatest challenge of this new interview procedure was to politely and immediately excuse myself after the questioning session and find a private location to verbally record as much information as possible and make any additional field notes.

The Focus Group Discussions

A total of 17 focus groups were hosted out of a desired 20. The size of the groups ranged from 3 to 17, with an average of 9 people per session. Group dynamics were affected by the size. The sessions with three to five participants were more consistent with a group interview. The large groups, 14 to 17 people, were less synergistic; however due to the range of experiences, the conversations were extremely lively and informative. The greatest difficulty in the focus groups was the inability of new Elderhostelers to respond to questions #3 and #4 of the focus group protocol (Appendix C). This problem surfaced early in the data collection process, but as we were unsure if it was an isolated or general problem, the protocol was not modified. As the data collection period continued, I realized that all members of the research team were experiencing the same problem. Based on the feedback I received, and my own experiences, questions #3 and #4 were re-worked then recast back to participants at the sites where I stayed in residence and had more time to individually approach participants on an informal basis.

Field Immersion

The value of staying in residence and participating in the regular activities was vital to learning how Elderhostelers make their educational choices. A successful pattern for

gathering data occurred at the first site, so it was adopted for use at the remaining two sites. This pattern began with hosting the focus groups as soon as possible after my arrival. This was important because it introduced me to the group and permitted participants to become familiar with the research and it gave me the opportunity to learn specific details about the study volunteers. In the days following the focus groups, it was crucial that I participate in all the programmed activities and, as situations present themselves, conduct impromptu individual interviews. Meal times allowed me to join small group conversations, probe emerging themes, and hear how the participants were reflecting on the study. It was during this time that I often heard "Well, actually I said ..... in the focus group, but I really meant .....". The final 24 hours at the site were the most valuable. Conversations flowed between participants, decision-making patterns were literally tossed around as people discussed their next Elderhostel site, and participants who had been candid with their opinions early in the week, felt liberated to clarify their statements and provide more truthful responses. All I had to do was listen and record!

In contrast, at the site where I was not granted permission to stay in residence, it was very difficult to develop any rapport with the hostellers. I was treated as a temporary visitor, a researcher from the outside, and as one lady declared in jest, a "member of the Elderhostel police".

The Ethical Dilemma

"All human behaviour is subject to ethical principles, rules, and conversations which distinguishes socially acceptable behaviour from that which is generally considered unacceptable. The practice of research is no exception" (Anderson, 1990, p. 17). It is the researcher's duty to be ethically responsible throughout the entire process. Alas, as a research design evolves, spur of the moment decisions must be made for qualitative research does not occur in a sterile experimental setting; it is situated in the life-world. In the field, to put it bluntly, I got more than I asked for! Some of the information was relevant to the study, some was not, and yet both sources of information were important to understand how and why participants make certain Elderhostel choices. While in the

field I had many informal conversations with a wide number of people, as many were quite curious about the study. It became a challenge to understand how all of what I was hearing related to decision-making. It was only after a period of reflection and working with the data that the pieces of information gathered all fell together.

In the end, it is the researcher who must resolve the ethical dilemmas that surface, and in accordance with their own conscience, make decisions which are ethically responsible. To ensure there was no deceit, personal harm, breech of trust or problems with anonymity in this study, everyone with whom I spoke was aware of the scope, sponsor, and purpose of the research, including my role and how the information was to be used. Additionally, everyone who shared information with me was advised that their contribution would be kept confidential. For participants in the focus groups and in-depth interviews, consent came in a written form, the *'others'* gave their verbal consent.

Summary

The success of qualitative research hinges on the suitability of the research design, the credibility and skill of the research team, the support of *'others'*, and working with the unanticipated challenges that arise. To expect this process to remain static would be naive. Qualitative research is about people, and thus certain complexities of human life will inevitably manifest themselves during an investigation. However, this does not deter from the valuable contribution of qualitative research, *au contraire*, it is an integral component. The prudent researcher must be cognisant of the factors that influence research in the life world, report them accordingly, yet continue to move forward and remain focused on the purpose of the study.

The next two chapters present the findings of this study. Chapter four identifies and discusses the fourteen criteria which impact on the decision-making process, then looks at how these factors are sequenced. Chapter five presents the participant typology.

Chapter IV

Discoveries

The beauty of an investigation grounded in hermeneutic phenomenology is that it allows people to be studied in their natural environment and permits the researcher to interpret and reflect on the information gathered throughout the entire data collection process. Deeper understanding of issues, themes, and ideas can be funnelled out and recast back into the hermeneutic circle of participant-researcher dialogue. Then, like the artist who must transfer his or her ideas to canvas, so too must researchers find ways to organize their discoveries and transfer them to paper, so that the findings may be shared in a meaningful way.

The purpose of this chapter is to present, examine, and discuss the decision-making factors and examine how these criteria are sequenced. I begin with a review of the demographic profile of the participants, then move to the major focus of this chapter, defining and describing the fourteen decision factors. The chapter concludes with a look at how different participants sequence their decision factors and draws some overall conclusions.

Situating the Participants

A small demographic questionnaire, issued at the start of each focus group, revealed that the 154 Elderhostel participants who volunteered for this study were fairly typical of the North American Elderhostel participant (Elderhostel Inc, 1995; Market Facts, 1990). As this study occurred in Canada, it was not a surprise to learn that 60% of the participants were Canadian; they came from seven provinces. The remaining 40% travelled from 19 American states and one lady was from England. The majority of the participants live in urban areas (72%), are female (70%), are fully retired (83%), and travel alone (77%). Of the 33% who travel with a companion, 65% are with their spouse, 26% with a friend, and the remaining 9% with friends and/or other family members. When

asked who made the decision to participate in Elderhostel, the responses fell evenly between the individual (35%) and a joint decision with a spouse (35%). The remainder of the decisions came from friends or other family members. The number of hostels attended by this group ranged from 1 to 20 sites, 5 being the average. Finally, when queried about their preferred place for learning, 80% indicated they preferred the mix of classroom activities and field activities. The demographic survey results are listed in Appendix E.

The average age of the study population was 68.4 years, slightly below the 1995 average of 71 (ELDERHOSTEL Canada, 1995). Table 4.1 provides an historical view of the age of the North American participants since 1983.

Table 4.1 ***The Age of Elderhostel Participants***

Age	1983	1989	1994	This Study
Less than 65 years	23.0%	19.9%	15.2%	28.9%
65-69 years	34.0%	30.5%	26.5%	26.4%
70+ years	43.0%	49.6%	58.3%	44.7%

(Source: Elderhostel Inc., 1995).

On the surface, this three year drop in average age did not appear earth shattering, however, as age surfaced as one of the major themes in this investigation, I decided to look at the range of ages rather than the mean, and that's when the comments I had been hearing began to make sense. The age range spanned 43 three years! The youngest participant was 42 years old, the oldest 85 years. I heard many age related comments, and now that I realize the participants span two full generations, many of the comments make more sense and will be addressed in the ninth factor, social.

The Decision-Making Process

A total of 154 Elderhostel participants were asked the question **"What factors influenced your decision to come to Elderhostel"**? This question opened the door for lively focus group conversations that ultimately produced an extensive list of decision-

making criteria. Initial participant responses often used broad, generic descriptors such as *'location'* or *'program'* to label their main factors, however, as the synergy of the focus group increased, more pertinent details of these generic labels were revealed that shed light on their deeper meaning. To illustrate, consider this statement by one Elderhosteler.

> The first thing I look for is location, then private bathrooms, golf courses, woods, seashore, extra-curricular activities, attaching Elderhostel to other travel plans and accommodations.

Upon closer examination, this statement reveals several, more detailed, dimensions of location including golf courses, woods, seashore, and attaching Elderhostel to other travel plans. Accommodations, a broad descriptor, is also listed with a qualifier — private bathrooms. What does this tell us? That accommodations may be mentioned as the second most important factor, but it is actually the availability of private bathrooms that is pivotal to the decision to choose one site over another.

The need to define became even more apparent when participants were asked the second research question, **"How are these factors sequenced in your mind?"**. An early analysis revealed a total of 46 different patterns (Appendix H). Generally speaking, participants would describe their sequence in one of two ways. The first was to use the large factor descriptions, like Mary and Frank. They described choosing the site by first getting an urge, then picking a geographical location, browsing the catalogue for an interesting program, then phoning Elderhostel to register. The other way people described the process was to articulate specific details which were important. For example, Robert told us that:

> Location is number one, I want to be away from a large city and I like the scenery, not necessarily the mountains. As far as the subject matter is concerned I prefer courses with outdoor activities and nature studies. As far as accommodations are concerned I appreciate the comfortable facilities which are offered in this hotel, but I have been to other Elderhostels in primitive conditions, and as a matter of a fact, it was the Elderhostel I enjoyed the most, not because of the accommodations.

Early in the investigation it became evident that although participants stated *'program'* as their first criteria, there were actually subtle differences between *'program'*

and *'course content'*. This led me to question the other generic labels such as location. After considerable reflection I realized that location also had several distinct dimensions such as geographical attractions and area assets, and that a separate factor, *travel*, could be distinguished. This sparked a curiosity to return to the literature and see if any previous researchers had attempted to **define** these constructs: they hadn't. What existed were qualifying statements classified under descriptive labels (Swedburg, 1991b; Rice, 1986; Romaniuk & Romaniuk, 1982).

At this point I knew I had found the major analytical challenge of the study, to identify the most important decision-making factors and gain a working knowledge of their dynamics and based on the information available at this time, develop a definition for each factor. This need to define factors and understand the intricacies of each one is critical to understanding the decision-making process and moving future research efforts forward.

To begin, I listed all the generic factors heard while in the field and while transcribing the audio recordings. The second task was to place, what I call qualifying statements, into one or more of the major factors. These categories, with their qualifying statements, were revisited and reworked several times. In the final analysis, 14 criteria were extracted and synthesized from the data: location, travel, program, course content, accommodations, cost, dates, negotiate with travel partner, social, sites, organization, personal requirements, escape and information. The next several pages share with you the details of each factor. Through the voices of the participants, using direct quotations and paraphrased conversations, I hope to illuminate certain aspects of these factors to help illustrate their meaning. These factors are not listed by importance, determining the strength of each factor is a focus for future research.

Factor 1: Location

The first and most complex factor is location. Location is defined as those elements in the decision making process that relate to the participant's desired destination and may include consideration of the geographical attractions, area assets, relate to a feeling of nostalgia to the area or general curiosity about the location (Table 4.2).

Table 4.2	*Factor #1: Location*
Major Sub-Component	***Descriptive Elements***
Geographical Attractions	geology, flora and fauna, mineralogy, woods, seas shore, near water, mountains, attractive scenery, natural attractions
Area Assets	local tourist attractions, family in area, family in region, golf courses, good time of year to visit this location
Nostalgia	have spent time in the area before, have been to the site before, attending a reunion or reuniting with a friend/family member here, visit Alma Mata, married here, ancestors buried here
Curiosity	see a new part of the country or visit a new country, want to visit a new location I've never been, curious about the area, always wanted to come here

When participants speak about selecting an Elderhostel site, location is usually one of the top three factors. Janet, a member of our research team, summarized her experience by writing that **all** of the participants in her two focus groups had pre-determined that location was their first choice and that they had already discussed the places they wanted to visit in the future. The list of criteria for this factor was massive. A small sample of the range of comments includes statement, for example:

> I've been to a lot of places in Canada and I wanted to choose a place that I hadn't been, and learn about how the people live there. I'm curious and I guess it is the reason I am here.

> We consider what else is in the drawing area, the area is important.

> Family in the area, done that twice.

> Ties in with a vacation or plan a vacation around an Elderhostel.

> Larry and I came because we hadn't been to Canada in a long time.

> I'm here with Don, he's a graduate of this university and we were married here.

It was this type of diversity that prompted a deeper examination of the qualifying statements, and at that time I began to recognize the four distinctions outlined in Table 4.2.

Factor 2: Travel

Table 4.3	*Factor #2: Travel*
The One-Tank-Tripper	**The Vacationer**
• must be able to drive to the site by car • must be able to access site by bus • return participant who prefers to stay close to home • new participant who is unsure about their first Elderhostel experience • will take a week 'just' to do an Elderhostel • convenience of others	• piggy back-to-back sites if the travel distance is long • want an overseas experience • want to attach the Elderhostel week to plans already made • in general, will not take a week just for an Elderhostel • high travel costs mean higher justification for journey required

The travel factor relates to decisions made concerning the travel distance, method of transport, and length of the journey (Table 4.3). Originally the qualifying statements in this factor were lumped together with location, but listening to the voices of the participants, the distinction became apparent. Location refers to the choice of *'where to go'* the travel factor relates to *'how to get there'*.

I have divided this factor into two sections for a very specific reason. The *'one-tank-tripper'* and *'the vacationer'* approach their choice of sites and programs from very different angles. Originally, when these distinctions emerged they were such strong themes that I thought the *'one-tank-tripper'* and the *'vacationer'* belonged in the participant typology. It was only after considerable reflection, reworking the analysis, and failing on several occasions to verbally articulate this theme, that I was finally able to understand where this information fit in the decision-making process.

Early on Elderhostelers make an important, basic choice: how far to travel. Will it be close to home or far away? The *'one-tank-tripper'* describes those who look for a program or subject of study in their own backyard. The distance travelled equals the distance you can go on one tank of gas. Generally speaking participants identified this as four to six hours of driving time. For some one-tank-trippers this choice is merely a matter of convenience, "For a one week trip, I drive my car. It must be in a one day's drive". For

others, particularly first time participants who are uncertain about their first experience, the one-tank-trip appeals because, as Leanne described, "I picked one close to home because I knew I could go home if I was dissatisfied or unhappy." Still for others, the attraction of small travel distance relates to the convenience of others:

> Mine have all been close to my daughter's house. I visit every summer and include an extra holiday week and she runs me down to the Elderhostel site, so it has to be reasonably close. I would like to go further afield, but I'll be 83 in December and I don't want to push my luck.

The vacationer, on the other hand, is travelling farther afield than one tank of gas. The vacationers who enrol for an Elderhostel site farther than six hours from home are on a vacation. This may be an **Elderhostel vacation**, or **a vacation with Elderhostel**, an important distinction. Why a vacation? I asked myself several times why that term was so appropriate and why people used it to describe this type of travel. I discovered that it's quite simple, throughout our adult working lives, we take vacations to get away from our jobs. This does not appear to change in retirement. Older adults take vacations from their regular activities, for as Andrea pointed out "I am very busy, retirement is a busy time of life, and we [the retired] need vacations too"! This sentiment was echoed by many hostellers.

As I mentioned there are two types of vacationers. The one who takes an **Elderhostel vacation**, plans their journey with **Elderhostel as the focus**. Due to the choice of traveling a greater distance, and the cost associated with that decision, these hostellers are looking at extending their experience to help justify the travel expense. Rachel and Ruth were two sisters who typified people making this choice,

> We've done two Elderhostels back-to-back with Kingston here and Niagra falls last week. When you're coming from Western Canada, its a long way to come for just a week, so we came for two ... we did that once before as well.

The second type of vacation is one who takes a **holiday with Elderhostel**. As Janine points out,

> Since we are visiting far from home, visiting relatives, it would be a wonderful opportunity to take in an Elderhostel.

Leon echoed a similar sentiment when he pointed out, and many hostellers would agree,

> I think if I was traveling long distances I would want to add on extra activities because of the cost of getting there.

One consideration that surfaced affecting both the *'one-tank-tripper'* and *'the vacationer'* concerned the method of travel. Jean's description about her travel choice helps illustrate this point,

> My sister had sent me information some time ago, and I though well I don't have a car, how am I going to get there? Well I didn't need a car. We were visiting in Montreal and Connecticut when I realized we could take a bus! So I thought, if I can go to one place by bus, you can do dozens of Elderhostels by bus or plane or train, so while it's a first one, I'll be back.

Factors 3 & 4: Program and Course Content

The next two major factors, program and course content, relate specifically to the Elderhostel offerings (Table 4.4). The factor I have labeled *'program'* contains decisions made that relate to the structure of the programs offered and the degree to which there is a physical component is built into the program. The factor labeled *'course content'*, on the other hand, relates to decisions made about the desired learning, or anticipated learning experience.

It is important to note that the qualifying statement, *'concentration of one subject'* is listed in both the program and course content factors. This is because of the context in which they are spoken. Sometimes people speak of *'the concentration of one subject'* it is based on the fact they have a learning goal concentrated in a specific subject area. Joy and Bernadette's comments help illustrate this distinction. Joy told us, "This is my 4th Elderhostel and it's always been genealogy, three at Brigham Young and now here". Similarly Bernadette, a jazz trumpeter and music lover, claimed "What has attracted me here for the 4th time is the concentration of one subject, jazz, then I have something in common with the other people"

Table 4.4 Factor #3: Program	*Factor #4: Course Content*
• outdoor pursuits • programs outside the classroom • interested in field trips • opportunity to practice learning is viewed as added value • level of physical activity required combine physical and intellectual activity • must have a physical component • program structure, time in class versus time out of class	• attracted to specific subject • fits personal learning needs • sounded interesting • topic appeals • look for levels of learning • courses must relate to the area • builds on current learning goal • expertise of the professors • general interest vs extended learning in a given area
concentration of one subject	

When the *'concentration of one subject'* is spoken in the context of the **program factor**, the comment is associated with the program structure. In the Elderhostel catalogues, there are many sites that offers three completely different subject areas during a single program week. An example would be a site which lists Cajun Cooking, Architectural Heritage, and Pottery as their subject areas (Elderhostel Inc., 1996, p. 8). This concentration, or lack of concentration, appeals to two different types of hostellers, those who like the mix and those who do not! Consider the difference between Bill who stated, "I tend to avoid the multi's where they have two or three different subjects," and Brenda who indicated, "I don't know if others agree, but I would choose a site where there is more than one subject being studied rather than a concentration." On this point, the demographic questionnaire indicated an 80% preference for program structures that offered a combination of classroom and field activities (Table 4.5).

This distinction between program structure and course content was another major theme which took considerable time to tease out. The confusion began with the generic descriptors used most often; program, courses, mix of program and courses. I felt there was a significant difference, yet it was difficult to articulate early in the analysis. Eventually, I realized that participants first spoke of their preferred program structure, then addressed the course content, *in relation to the structure.*

Table 4.5	*Course Offering Structures*		
Session	Mixed Learning (Currently available)	Learning Theme (Currently available)	Concentrated Learning (Relatively unavailable)
1	Subject **A**: Theory 33% of time	Subject **A**: Theory 33% of time	Subject **A**: Theory 50% of time
2	Subject **B**: Theory 33% of time	Subject **A**: *Practice* 33% of time	Subject **A**: *Practice* 50% of time
3	Subject **C**: Theory 33% of time	Subject **B**: Theory 33% of time	--

Table 4.5 illustrates the three program structures that were described by participants and site coordinators. The first structure, **mixed learning**, is what many experienced hostellers refer to as the *'traditional'* Elderhostel offering. It includes, at one site, three separate classes, in three different subject areas, all taught in classroom. The second structure, **learning theme**, was a program that offered only two subject areas. The first session teaches participants about the subject, the second session provides the opportunity to experience or practice this learning. For example, if golf is the subject, the theory class would teach the history of golf, regulations of the game, etiquette and how to choose clubs. The practicuum would be on the golf course. If the subject was genealogy, the participants theory session could involve information on where and how to trace genealogical information, how to construct a family tree, or provide area specific information. The practicuum would be in the library learning to search the stacks, computer indexes, and archives. The third session, subject B, is an unrelated topic.

Finally, the structure labelled **concentrated learning**, is similar to the one above, except there is no second subject, consequently the time available to concentrate on the topic is divided into half theory and half application. In this study I had only one site, Jazz, where the morning was exclusively theory, the afternoon practice. Interestingly enough, this site was not only filled to capacity, as it is most years, the return rate is very high, eight people were attending for their eighth time, another four, their fourth time.

All three program structures have a different appeal. The mixed learning structure appeared to be of greatest value to people who travelled with a companion, for it provides

the greatest flexibility when trying to select a site which satisfies two or more people travelling together. Many participants stated that it is only realistic to expect to match two out of the three subjects. An item written in my field notes after the third focus group reflects this theme, which was confirmed in subsequent group discussions and in-depth interviews.

> When travelling as a couple it's easier to match three session, if he likes A and B, and she likes B and C, the couple can decide to attend an Elderhostel site together. Each person has one class of their own, they attend the common interest course together, and skip out the third class, if it is unappealing. Interestingly, most people indicated that they often go to the class that wasn't of interest, and because the instruction is so marvellous, end up staying and enjoying it more than expected!

The learning theme course option was, I felt, the most popular format when choosing a site, for two reasons. First, it allowed participants to learn about a subject, practice what they learn, which takes their learning to higher levels (Bloom, 1956). As Joanne stated,

> I really like if there is a combination of art appreciation, then a trip to the art museum. If it's drama, I'd like to learn about Shakespear, then go see the play and get a bit of the background, talk to an actor. I like the combo idea where there is learning and doing.

The second reason people choose the learning theme structure, was simply because it got people moving. A good number of participants told me that they would not choose a site where they would be expected to sit through three classroom lectures. This message came across loud and clear! A number of Elderhostel participants will choose their site because they know they will be able to be outside or have a practical learning experience. One conversation I recorded at a site reflects this need:

Brandon: We've had a really good balance of class lectures and time outside. If you're outside all day you need something that extends your depth of knowledge about that area, its just a good balance.

Sarah: I don't think I would choose to sit in a classroom all day would you?

Diane: No.

John: Me neither.

Wanda: In February, I took a course which was excellent, but we sat in class all day, ate a lot, and I felt like a massive blimp by the time I got home. And I thought, I have to go somewhere where I'm doing something, that's why I choose this site.

This discussion on learning theme leads to the fourth factor, course content. Attracted to the subject, furthering a learning goal, trying a new subject, expert instructors and wanting to learn about the geographical area were common qualifying statements that related to course content. The major theme of this factor however related to a concern by participants for the *level of learning* available in Elderhostel courses. Level of learning relates to the cognitive challenge. For those participants, committed to extending their knowledge in a particular subject area, there is strong interest for more advanced classes in certain subject areas. Sam spoke to me about a friend of his who is interested in photography,

> I think that levels are really important. I have a friend Jack who has taken a lot of photography courses with Elderhostel. The last one he went to implied that the level of photography would be advanced so he went, but he found the level of instruction was way to simple, so to keep busy he ended up teaching [laughter] and that's not really what he went there for.

I spoke to Jack, a return participant, who confirmed Sam's comment. Every time Jack searches the catalogue he looks for an advanced photography course. There are none.

Jack was not alone with his dilemma. The genealogists, the golfers, and the music lovers I met were all interested in having a choice of learning levels. The disadvantage to always teaching to one level, somewhere in the middle, is that it makes the beginners feel inadequate and frustrates the individual who is looking for a higher intellectual challenges. Two genealogists, Lenore and Doug, who have 20 sites each, privately shared their feelings on this issue,

> we want to learn more in the subject area but we know the learning will be too elementary, so we come to enjoy the Elderhostel experience and plan to skip the classes to do our own research.

In actual fact, Doug attended most of the classes and Lenore worked on her research. How did the other hostelers react? No one was bothered for it was evident that the

learning needs of these two people were not being met by the content of the classes. The fact that they were very honest and open about working on their own research was accepted, they were not labelled as *'users'*, a type of Elderhostel participant that will be described in chapter five.

For the beginners, the frustration of a middle learning level is best reflected in these four comments I extracted from four different sites. The first comment comes from a return participant:

> Some of the specialized areas should have levels. The tennis at one site was a disaster because it was such a mixed group that the instructors had trouble even getting the program off the ground.

The second comment was spoken by Ryan, a new participant travelling with his wife, who chose to attend a site geared to the physically active.

> When you've never been to one [Elderhostel] at all you have no idea what to expect. You've got to focus on whatever that activity is. We didn't want to find ourselves discussing things which may be of great interest to us, but, about which we know nothing next to the people with us .... like the professional walker [the group laughs as Ryan points to the chap beside him]. I don't want to come into a discussion of Plato or Aristotle and be with a group of people who know everything there is to know about the subject, they just don't want to exchange their secrets. I didn't want to be in that position, so we chose something that asked very little of us, something very easy [laughter again]. Page after page in the catalogue there is something we'd like to do, but for our first one we didn't want to step in and find it was way over our heads.

This third comment was spoken by a new participant at the genealogy site and her sentiments were echoed at other sites.

> We don't want private lessons, but we feel strongly that the learning needs of beginners and more advanced people are different and must be accommodated, otherwise both groups of people loose.

The final comment came from Karen, a first time participant who chose a site which offered golf theory, golf practice, and music theory, as courses.

> Well, I like to try new skills and see how I do, and I have wanted to learn golf, but in a clinic. I've had a lot of exposure with other educational activities and I knew that Elderhostel provided quality learning, so when my friend suggested this course was for beginners I thought, well, I'd give it a try. But, I feel it hasn't been an absolute beginners course. I found the golf a little bit intimidating and I felt bad. I know Joyce did as well [another beginner]. I felt they should have been grouped differently, perhaps dividing the session into levels. The music, well I've done a lot of music and the level here is quite low, especially if I compare it to other courses. I think the descriptions must give better information because people become frustrated, scared, or disinterested.

How does this concern for learning levels relate to decision making? Instead of having a potential return participant ponder which site to attend next, they first have to decide if Elderhostel can still meet their learning needs, which is of course a primary reason for participating (Adair & Mowsesian, 1993; Boshier, 1971; Brady & Fowler, 1988; Cross, 1981, 1992; Havighurst, 1969, 1976; Morstain & Smart, 1974; O'Connor, 1987; Romaniuk & Romaniuk, 1982; Wirtz & Charner, 1989).

Factor 5: Accommodations

Table 4.6	*Factor #5: Accommodations*	
•	Private vs semi-private vs Communal bathroom facilities	• RV facilities
•	General comfort	• Won't stay where a roommate is imposed
•	Quality of food	• Single room requirement
•	Ability to cater to special needs	• Ability to get 'around' (ie. elevators, amount of walking to classes)
•	Quality of beds	
•	Arrive early/stay late options	

The fifth decision criteria is accommodations and includes the same items one would typically associate with selecting routine hotel accommodations (Table 4.6). The importance of this factor to choosing a site is well summarized in a field note I wrote, while in residence at my second site.

> Everyone attending this session agreed that they read the accommodation information to the n^{th} degree. In general the participants felt the information was sufficient, however there were some who disagreed.

The range of accommodation needs varied among participants, but the subject of private vs communal bathrooms provided some of the more lively conversations, and bathrooms are definitely a consideration when selecting a site. There was general agreement for Hank's comment when he said,

> the senior of today is not the senior of yesterday and creature comforts are more important to today's senior.

Despite this interest in creature comforts, the range of comments I heard about accommodations and bathroom facilities extended the full gamut. Wanda announced,

> the first thing we look at is, does it have a room with a private bath. If we have to sleep on the ground or share a common bathroom, we stop right there.

For other participants, the private bathroom was desirable, but they would not give up a particular experience if they wanted it badly enough, just because of the bathrooms. Some return hostellers who had endured 'less than desirable' bathroom facilities agreed with Georgette who shared with us,

> I've always said a private bath is very important but the ones where I've had the most fun are those with the bathroom on the floor! And I don't know that the bath on the floor is so fun.

This phenomena was echoed by Desire when she described a previous Elderhostel experience.

> It's interesting because we signed up for three choices on our second Elderhostel and we got our 3rd choice and we got in a dormitory with shared bathrooms and it was interesting, for it worked out! We had to share a common bathroom and it turned out wonderfully. Everyone was in the same spirit, they didn't want to share either, but everyone was in the same spirit and you got lots of exchanging, laughing. Everyone has the same schedule, some arrive early, others would be late, and there was lots of fun.

To summarize, it would be safe to say that: (1) some participants will only choose a site with private bathroom facilities, (2) some participants require private facilities for a personal, physiological reasons, (3) a small number of participants are willing to accept less than a private bath if the experience is interesting enough, (4) the majority of people prefer private bathrooms, the least desired is the communal bathroom, and (5) in general it

seemed that participants were happy to follow the old adage '*when in Rome, do as the Romans*'. When selecting a North American Elderhostel site they want a higher standard of hotel-like accommodations; when they go abroad or to a remote area they are willing to accept more rugged bathroom facilities.

Another element of accommodations which affects the ability of some participants to decide on a site, concerns the lack of detailed information regarding access. Francine shared with me, during an interview, had she known of the amount of walking between her bedroom, the dining hall, and classroom, she would not have chosen this site. She feels that her inability to walk fast is a burden on others and this saddens her and makes her feel bad.

Finally, and of extreme importance to the single traveller, is the availability and cost of single rooms. Not all hostelers are willing to share accommodations with a person they do not know. Veronica, a lady in her late 50's, stated this position strongly when she announced that,

> I will NOT stay in any accommodation where a partner is imposed on me. That was the older generation, not mine.

I have extracted a few other comments which best reflect the sentiments towards the issue of single accommodations. The first one comes from a discussion during one focus group when the topic was accommodations. Kathy, a member of our research team, was trying to distill as much information as she could about this criteria.

Lila:	You can almost loose someone who doesn't want to have a roommate.
Janet:	It puts people off.
Kathy:	Is the single supplement expensive?
Annette:	Oh yah, some of them really are.
Kathy:	So is the single supplement a problem?
Lila:	You have to take an assigned roommate you don't know anything about, they may smoke, or drive you crazy.

Kathy: So this would be encouraging, having double accommodations, but not mandatory.

Group: .... a general hum of agreement [then the cassette reached the end and had to be turned over!]

The second comment came from a seasoned Elderhosteler, a female widow who had travelled in the USA, Canada, and enjoyed several overseas programs.

> Another thing I wonder, some sites really seem to discourage singles because the supplement is to high or there is no single supplement and some people really don't want a room mate.

Finally, another seasoned, single female participant described her feelings on the roommate issue as follows (the name of the site has been deleted to guard anonymity).

> The only time I would share would be at the ____ Centre, it sounds so wonderful I would take any accommodation. ____ is a very fine institution but I question the fact that they have a policy that you MUST come with someone. They've built a new building and if I didn't feel so strongly and favourably about Elderhostel, I would file a complaint. It discriminates against singles.

For single travellers, imposed roommates, the availability of single rooms, and the cost of the single supplement are all considerations when selecting a site.

Factor 6: Cost

Cost is the sixth decision making factor (Table 4.7). Cost is defined as all monies that must be spent to register for a course and travel too and from the location. In general, Elderhostel domestic programs are viewed as good value for money. Ed reflected the feeling of many domestic hostellers when he enthusiastically declared, "Where else can you have room and board, plus quality education for $900.00 per week for two people"!

Table 4.7	*Factor #6: Cost*
•	bottom line: hostellers want value for money
•	prefer to travel off season to obtain better rates
•	most cost efficient, when travelling a long distance, to combine Elderhostel with a family visit or previous holiday plans
•	low price of Elderhostel means you can visit two sites on the same travel budget
•	exchange rate influences country choice
•	late site confirmation can result in higher travel costs
•	travel within North America is considered good value for money
•	travel abroad is considered on par with commercial operators

When speaking about the travel abroad programs however, the cost issue is viewed quite differently. The general consensus I heard, was that overseas trips with Elderhostel cost the same and sometimes more than travelling with a commercial operator. The reason participants would first choose an Elderhostel travel abroad program was for the value-added learning opportunity. However, most did not hesitate to point out that if they had planned to go abroad, and an Elderhostel program was not available, they would go anyway. Once the decision to go overseas was made, the fact that Elderhostel could accommodate their experience was viewed as an asset.

When speaking generally about cost, a number of participants indicated that domestic *'Elderhostel packages'* were most cost effective, compared with other travel options. David told us,

> cost is influential, because if you're thinking you'd like to go to a place and if you don't like prepackaged tours, then you face having to work it all out yourself for a reasonable cost and this certainly gives you a nice core for a trip."

Rob and Jane, first time participants also enjoyed the inclusiveness of an Elderhostel package, and for their first experience, wanted to keep the costs down.

> I think location is important because of the travel costs. I'd like to go to the other ones in Europe but we thought we'd try our first experience here, it's very inexpensive. Everything is covered and you know exactly what you have to spend, it's much easier than when you have to rely on all your meals out and things like that.

Others commented on the fact that course costs were not the largest factor, rather, it was the costs associated with travelling to the site. Jennifer, a veteran hosteler, confirmed this when she said,

> for most of us the biggest price is not the course, but getting here and who knows what the airlines are going to charge, you have no control.

Not all Elderhostelers however, are as financially solvent as their mates and those in a stronger financial position were careful to state that,

> you have to have a variety of options available. There are those Elderhostelers who are going to be less able to handle the economies and will need to choose an area close to home.

The final theme relating to cost focuses on some Elderhostelers willingness to occasionally sacrifice cost for a once-in-a-lifetime opportunity. Ralph, attending a focus group hosted in Canada's arctic, made this remark.

> I could see it [cost] change according to circumstance ... for example affordability is an important consideration, but when this opportunity came along, to go to the Arctic, that completely over-ruled everything [laughter]. It's not affordable but it's such a great opportunity, you take it!

Factor 7: Dates

Table 4.8	*Factor #7: Dates*
•	try to avoid tourist seasons
•	want to stay at home when the weather is good
•	want a particular type of weather: warm in winter, cold in summer
•	must fit in with vacation from part-time or full-time employment
•	must fit in with busy retirement schedule
•	have a personal preference for travelling at a certain time of year
•	only one time frame available this year

The seventh major factor is dates, the most suitable or only available time to enroll in an Elderhostel program. Table 4.8 gives a fairly good indication of the nature of the decisions made associated with this factor. The interest in travelling off-season, to

capitalize on economic travel rates and the avoid tourist season, was a reason many Elderhostelers chose to avoid travel in the summer,

> I guess time of the year is number one. June and September are the times of the year to travel because July and August are so marvellous at home.

Indeed for some Elderhostelers, they do not want to enrol for a course when the opportunities at home, or at the cottage, are optimal.

Other participants were restricted with the dates available for an Elderhostel experience. Evangeline told us, "I looked for Florida in January and nothing else, I'm influenced by the season." The reasons Marie-Claude, a single traveller in her fifties, who was still working full-time, reflected were different,

> I'm really limited time wise, time of year is really important. Once it fits into my vacation slot, course content then travel costs are important.

However, the sentiments expressed by Louis and Christine, who were recently retired, describe the majority of hostellers,

> until we retired we were limited to summer and other holiday periods. Now that we are freer we can go whenever we feel like it!

Factor 8: Negotiating with Travel Companion

Table 4.9	*Factor #8: Negotiate with Travel Companion*
•	final selection is a joint decision with travel partner
•	must follow a particular negotiation process with travel partner
•	compromise with partner
•	deals with partner for alternating first choice

The eighth factor, negotiating with a travel companion, is the process whereby two or more Elderhostelers engage in some form of negotiation to reach a consensus regarding which site to attend (Table 4.9). The dynamics of this factor led to many animated conversations which helped explain and provide insight about how travel partners negotiate their site selection. However, before this is discussed, it is important to first consider who are the travel companions.

Table 4.10	*Travel Companion*	
Response	Number	%
Spouse	64	64.6
Friend	26	26.3
Member of Family	5	5.1
Spouse & Friend	4	4
Total	99	100

Spouses (64.6%) and friends (26.3%) represent the majority of the travel partners. Siblings or a combinations of widowed family members represented the 5.1% who travelled with a family member. The smallest category, spouse and friend (4%), describes two couples (4 people), husbands and wives travelling together.

The other factor that must be considered when negotiating, is who makes the choice. Table 4.11 presents the distribution of responses to the question "Who made the decision to participate in Elderhostel?".

Table 4.11 Who Made the Decision to Participate	%
Me	34.4
Joint decision with spouse	34.4
Joint decision with friend	9.4
Spouse	5.5
Joint decision with friend and spouse	5.5
Friend	4.7
Family member	3.9
Joint decision with family member and friend	2.3
TOTAL	100

It is important to note that this table represents all participants, not just those travelling with a partner, an explanation for the large number who indicated they made their own decision. Excluding the individual decision, joint decisions with a spouse or with friends were indicated most often. Donna and Harvey, travelling with their friends Winnie and John, comically shared their negotiation strategy.

John: We have no trouble making a decision. I make the decision [laughter from the group].

Winnie: No seriously, we agree with each other, then tell Donna and Harvey where we are going and the four of us go together. But this time we are here because Donna and Harvey are interested in jazz. We just love to see Harvey happy.

A strategy for negotiating within couples has already been mentioned when I discussed the program factors. Each member of the couple will individually select sites, then together try and find a match. It would be safe to say that people will agree on two of the three courses and the third is considered less important.

There are a variety of ways that people negotiated their site selection with their travel companion, however, based on this experience I can make one general observation. The negotiation strategy varied between couples, but within couples, there seemed to be two patterns: one partner would decide and the other would tend to agree, or there was a *'50-50'* negotiation process required to reach the final decision.

Factor 9: Social

Table 4.12	***Factor #9: Social***
• friends were coming	• social fabric binds everyone
• spouse persuaded me to come	• meeting people
• meet people with a kindred spirit	• people always mix immediately
• congenial, interesting, fun people	• everyone welcome
• enjoy the same social class	• safe for single participants
• no snobbery of people acting more intelligent than others	• casual atmosphere
	• age of fellow participants

Social considerations are included in the ninth factor (Table 4.12). The decisions related to this factor included a desire to meet and spend time with people similar to oneself, people with a particular zest for life. The elements of this factor are interwoven in many ways with other factors. Discovering a social factor is consistent with numerous previous researchers. (Adair & Mowsesian, 1993; Boshier, 1971; Burgess, 1971; Cross, 1981, 1992; Heisel et al., 1981; Henry & Basile, 1994; Morstain & Smart, 1974; Rice, 1986; Roberto & McGraw, 1990; Romaniuk & Romaniuk, 1982; Swedburg; 1991b).

The social fabric of Elderhostel is the root of the organization, its major strength. This root is referred to by participants, staff, and volunteers alike as the *'hook'*; it's what makes Elderhostel unique, bonds participants together, and ties people to the organization. The return participants agree that once you attend your first site, you get hooked and are drawn back. But not everybody is hooked. I met some first time participants, who I believe will not be returning for a second experience. They were not hooked, they did not share the same feelings towards their experience.

So how does one describe the hook? Well there is no doubt that the hook is a social phenomenon and I have selected four different quotations which best reflect the nature of this enigma.

> I go to Elderhostel to have fun and be with the kind of people I like, I go on holidays to see places.

> The type of people who attend Elderhostel are flexible, unspoiled, helpful, friendly, adventurous, outgoing and love to learn.

> The reason we keep coming back is social. It's Elderhostel's greatest asset and if this were ever to diminish, we would stop coming to Elderhostel.

> It's simple, the opportunity to meet with new people with a similar interest and a certain zest for life.

The fact that people can weave into the social fabric of Elderhostel is what makes the organization so strong. Theresa shared an extremely common sentiment,

> My friends influenced me to come here, they have similar interests. The area of study is the main thing, I can be with friends, outdoors, share similar interests .

This feeling is echoed in Werner's statement,

> I think another factor in choosing Elderhostel is that, whatever you choose, other people have chosen for similar reasons, you meet people of similar interest, there is lots of open discussion and exchange, in addition to the actual courses.

The thread which binds Betty to the organization is that,

> For the person travelling alone, you never feel the odd man out at an Elderhostel. To start with, there are always others that are travelling singly and I find a different type of clientele here.

Similarly, Rita indicated that,

> One reason I chose Elderhostel over the others is because I am travelling alone and my husband doesn't want to come with me and I always meet someone here to go around with.

The social acceptance of the single traveller was important to both the person travelling alone and those attending with a companion. Finally, on several occasions I heard how,

> you meet a lot of great people who go [to Elderhostel] not only for the vacation or holiday experience but also the learning experience. I think the combination of those two are very important.

This theme resonated everywhere and confirmed that one of the major reasons people return to Elderhostel is because of the people, the social experience. The social fabric almost seems to lay over top of the decision making process like a warm blanket.

It was interesting though, that while many people indicated they were *'here'* because either a friend invited them, or a family member recommended Elderhostel, when people asked about how they choose an Elderhostel site, this important factor got little mention. The intrinsic value of the experience did not seem to pop into people's mind as a decision criteria, rather they focussed on the more pragmatic factors like cost, dates, location and course content.

One alarm button, concerning the social fabric, was sounded by participants at all three sites where I stayed in residence and had the time to get to know people individually. This alarm concerns the 43 year age range referred to at the beginning of this chapter. I feel

it is important to describe this concern, for it not only affects the decision making process of certain individuals, I believe it has the potential to weaken the strong fibres that bind the social fabric of the organization.

In the recent years Elderhostel has adopted new policies on aging to reflect new attitudes towards, acknowledge the changing demographic profile in society and recognize people's human rights (ELDERHOSTEL Canada, 1994; Elderhostel Inc, 1995). When Elderhostel began, participants had to be 65 years of age or older to be eligible for the program. Today the age recommendation in the American Catalogue is described as 55 years of age, with travel companions being allowed as young as 50. In Canada, eligibility is advertised as "for people who have retired or are planning retirement. Participants are normally in their mid-fifties and beyond" (ELDERHOSTEL Canada, 1996, p. 2). This more liberal definition of aging is cause for concern among the participants, and affects decision-making in the same way as levels of learning, in that before a person can decide on which site to attend, they first must decide if Elderhostel is still the organization for them.

To illustrate this concern, which was a frequent topic of discussion at the dinner table, consider the difference in comments made by three participants. The first comes from a chap in his mid-fifties who commented that,

> Elderhostel has to adjust to a new definition of aging, allow the organization to grow and meet the needs of today's elderly.

Janice, aged 55, added,

> I'm not sure I really want to go to a place where everyone is sitting around talking about the war, that's not my generation.

In contrast, was the voice of an older participant. Francine, a lady in her 80's who has been to so many Elderhostels she has lost count, sadly stated during our interview that,

> I guess I'm probably getting too old for the **new** Elderhostel, this might have to be my last one.

Another aging concern relates to the sites and their ability to accommodate special needs. One site I visited had a number of people who required the use of a hearing aid, two had walking difficulties and one fellow was visually challenged. Although only three of

these individuals participated in the focus groups, and one agreed to an in-depth interview, several others shared their thoughts during the morning coffee break between classes. Among this group of people with various physical challenges, the feeling was that the catalogue did not provide sufficient information to allow people to make informed decisions related to their physical needs. It frustrated a few, who also happened to have been educators, that the professors were not versed at simple paraphrasing techniques to enhance the learning environment for the visually and hearing impaired. To me it seemed incongruent that an organization targeted to the elderly would not have better means to cater to these needs. This may have been an isolated case, but it did cause me to wonder.

Factor 10: Sites

Table 4.13	***Factor #10: Sites***
• reputation of the program, instructors, site and or volunteer coordinators, and institution • access to the site • access around the site	• ability for the site to cater to special needs such as hearing impairments and walking difficulties • extra curricular activities planned but not advertised • involvement of local site coordinator

Site considerations are those elements, specific to a location, and with the exception of access to the site, the components of this factor can be managed or influenced by the local site coordinator (Table 4.12). The responsibility of the site coordinators is tremendous. They are the ones who coordinate all aspects of the local program, write the catalogue descriptions, and help set the atmosphere. When participants evaluate and compare sites, it is from many angles, including the quality of the instructors, special attractions of the site itself, the institution, and the involvement of the site or volunteer coordinators. When participants share information about *'the good sites'* the ones which came out on top, and the ones that people would revisit, the site coordinator was inevitably mentioned. I was fortunate during my four site visits to experience a site that participants labelled *'good'* and a site that was labelled *'bad'*.

At the *'good'* sites, the site coordinators were present several times throughout the day, made all the major announcements, socialized briefly, and organized a special end of week social event which they personally encouraged and supported. This type of involvement delighted hostellers and made the atmosphere extremely positive and energetic. People bonded well together and many indicated they would return to the site, recommend it to friends, or both! I recall vividly, during the talent show wind-up evening at my first site, one very jubilant hosteller repeating after each act,

> Isn't this great! This is the **REAL** reason people come to Elderhostel, the courses are great, the locations are interesting, but this [pointing to the stage] is really what it is all about!

At a different focus group, another participant described a similar, positive experience with the site coordinator.

> The last site we attended had a marvellous leader [site coordinator], and she said, you are all going to know each other. We were paired up and then we had to go away and come back talking about our partner. By the end of the night we did know each other and it really helped make it a wonderful experience because of the camaraderie that was built. I think the leader is tremendously important.

Elaine, who was attending Elderhostel for the twentieth time, and who's parents used to be participants told us,

> What I like, not at this Elderhostel, is that many have evening programs which greatly enhance the value of the experience. I don't know where they come from, they're not listed in the catalogue, but they are great!

And one final illustration,

> My husband and I have been to the same place three times and half the people had been there before. They have a tremendous director, really excellent teachers, warm atmosphere, and it's intellectually stimulating. It's wonderful to come back if you find that situation and you see people you've seen before. It's like coming to camp! You get so close to people and then never see them again, but then they happen to be at another Elderhostel and it's thrilling. It's like we really are alumni.

The *'bad sites'* appear to be those sites where the site coordinator is largely absent. At one of the sites I visited, this was true. The site coordinator made only two brief visits during the week (one to talk to me), attended the final dinner, then abdicated all involvement to a volunteer coordinator who tried desperately to manage but did not have the support to create the social atmosphere Elderhostelers know and want. Margaret, attending her 15th site, had this to say during an in-depth interview,

> Where is the site coordinator? We never see her. I was kinda wondering what her job was because usually they are involved with us. Normally the coordinator plans things to help bring the group together. I remember one site where there was a giant puzzle in a common room where people could meet and build together and another site when we were notified in advance to bring our hobby, or a sample of our hobby, to share with people one of the evenings. And there was another site, we went for a late night fitness walk through the forest. These were great fun and didn't cost anything.
>
> Most sites at least have a coffee room where you can get together. Here there is nothing. The little rooms at the end of the hall aren't suitable because they have only one table and that's filled with bridge players, and you don't want to disturb their game. So what do we do, we sit in our rooms, or mingle in the hallway, or visit with two people in our room which is not great. At least we have each other [referring to her husband Walley] but I feel sorry for the people who are here alone, it must be very lonely.

This aspect of loneliness was confirmed by several of the single ladies, one in particular who was a first time participant. Penny, a widower, had heard about the fun type of people who attend Elderhostel and the terrific learning opportunity, these were two of the reasons she decided to give the program a try. Sadly, she was disappointed by the level of learning and she felt the site did nothing to promote the opportunity to socialize and get to know people. My personal feeling is that Penny will not return to Elderhostel. She was not *'hooked'*. I know for a fact that Margaret and Walley will not return to that particular site, for they told me so, but, they will return to Elderhostel. The significant difference here is that Margaret and Walley have attended fourteen previous sites and are *'hooked'*. Therefore, they will chalk this experience up to a *'bad site'*, not return to this particular venue, but, they will continue with Elderhostel.

What does this tell us? The burden on the site coordinator is immense, they are the ones in the position to make or break the Elderhostel experience, they are the ones in the position to help get people *'hooked'* on Elderhostel. This is difficult, for the degree to which individual site coordinators are capable, or wants, to be involved varies. At the larger academic institutions where resources are dwindling, and Elderhostel is just one of many programs, setting a social climate becomes a significantly greater challenge than at a commercial sites where the livelihood of the site coordinators is more directly linked to the success of an Elderhostel program.

Factor 11: Organization

Decisions related to Elderhostel's policies, program requirements, organizational philosophy, and methods of operating form the eleventh factor. One element, information, which is a direct responsibility of the Elderhostel organizations was so massive, that it was isolated and allocated as its own factor label, #14.

Table 4.14	***Factor #11: Organization***
• attended before and liked the experience • 1st or 2nd choice cancelled • appreciate good quality instruction • like to try new organizations • age eligible now • unique program	• discipline of class attendance policy • travel alone or with a companion, equally accepted and welcome • recommended by friends/family • like the attitude of the Elderhostel staff and volunteers • not a tourist organization

Like the social factor, some of the components in this factor act as a blanket that lays over the decision to attend Elderhostel. These components relate to the Elderhostel philosophy, the fact it is not a tourist organization, the high quality of instruction, and the welcoming attitude which is promoted and savoured. When people were asked to consider why Elderhostel and not another travel program was chosen, the opportunity to combine quality learning, with travel, and a warm social environment was cited. As Janet, from our

research team, summarized after two of her focus groups,

> it was not that Elderhostel was that much cheaper than visiting the area on a bus tour, but the value of the instruction made Elderhostel a more value added option.

The *'Elderhostel Lottery'* was a concern for some participants, others found it a fun game. The Elderhostel Lottery refers to the fact that registration is not on a first-come, first-serve basis. Registrations for a given site are put together and then the *'lucky ones to win'* are those who are randomly selected from the masses. For sites that don't fill, this is not an issue, but for those who regularly fill to capacity, and Elderhostelers know that a particular site has a fantastic reputation, consistently losing the lottery can become a source of frustration. For participants with lots of time on their hand, and if they are planning a *'one-tank-trip'*, the waiting game to confirm a site does not seem bothersome. But, for those planning an *'Elderhostel vacation'*, this lottery system is a source of frustration and has financial ramifications. Fernand described it this way,

> If you have a week away and are lucky enough to get your name drawn [in the Elderhostel lottery] then you are o-kay, but it is difficult to plan a holiday. We have a time share and the earlier you get in your bid, the better your chance, and you are encouraged to sign up for optional sites.

I chatted with Fernand after the focus group and both he and his wife felt that earlier confirmations and registrations would be helpful. This sentiment was common and participants wondered why it was not possible given the computer technology available today.

Factor 12: Personal Requirements

Table 4.15	***Factor #12: Personal Requirements***
• must travel alone • need intellectual stimulation • level of activity • selecting a travel companion • always wanted to go to college	• fitness requirement • physical limitations • visiting the area but do not want to impose of friends due to their age

Decisions made relating to some personal needs or interests are found in the twelfth factor, personal requirements (Table 4.15). The personal needs vary, for some it is the pursuit of intellectual stimulation, others it is a desire to fulfill a life long dream and go to college, for others it's an opportunity to engage in a form of fitness, and for some,

> I think there is one more reason people choose Elderhostel, but they don't always admit, and I know there are some in our group. Because its near some relatives and we can see people without being a burden.

Factor 13: Escape

Table 4.16	***Factor #13: Escape***
•	needed a break from regular activities
•	family tragedy, needed to get away
•	living with children, needed space

The choice to attend an Elderhostel site, because an individual feels they must get away, take a break, from some situation in their personal life is the thirteenth factor. Table 4.16 lists the short, but special elements of this factor. The escape factor was originally included as a sub-section of the social factor, but again due to its special nature, I feel, as other researchers have found, it is a separate factor (Boshier, 1971; Burgess, 1971; Cross, 1981, 1992; Henry & Basile, 1994; Morstain & Smart; 1974; Rice, 1986).

I was fortunate to meet one participant who had escaped to Elderhostel and to my good fortune she approached me to talk about her situation and agreed to attend a focus group. Linda was at this particular site for one reason: to escape the pressure at home resulting from the death of her child who passed away a mere three weeks earlier. She expressed having a difficult time dealing with the aftermath of the death and couldn't bear the situation. As an experienced Elderhosteler, she knew the social environment she could expect, so she phoned up Elderhostel to find a program with a vacancy in her local area. Linda explained that she knew Elderhostel would be a safe haven where she could regain her strength and allow her to return home in a better state of mind. The one other factor affecting her site selection was location, she wanted a *'one-tank-trip'*, the program was irrelevant.

I also heard a group of experienced hostellers speak of one fellow who, since his wife died, lives with one of his children. He enrolls for several Elderhostel annually to take a break from his new living situation. This reason, may in fact become more prevalent in the future as more older adults find themselves in similar positions and seek ways to harmoniously adapt to new living conditions.

Factor 14: Information

Table 4.17	*Factor #14: Information*
•	catalogue: content, distribution, access
•	word of mouth
•	participant endorsement
•	read about Elderhostel in newsletters, papers or magazines
•	received a catalogue before becoming age eligible
•	friend had a catalogue

Information is critical to the making any informed choice (Table 4.17). Decisions are made over time. Consequently, we need certain information at different times during the decision process to help eliminate and finalize options, and to ensure that the final choice we make best fits our needs, is most appropriate given the circumstance, and can be justified (Ranyard, 1990). Different people also require different amounts of information, need information at different times, and look for different things. All this to say that any organization trying to communicate its program to the community has a challenge on their hands.

Elderhostel participants have, as their main information resource, a catalogue. It is the sole publication which all participants on the mailing list receive on a regular basis and therefore it was not surprising to hear a good deal of feedback on the catalogue. The range of comments relating to informational needs was so vast that I have chosen four aspects to discuss, those which emerged most frequently. The first comment concerns the need for Elderhostel to make their information available to the general public so that new participants can have access to *'something'* which will encourage and promote the first registration. One focus group had this to say,

Deanna: If you've got lots of people, why don't you make your catalogue more available? We didn't know about your magazine, only from friends and we had to send. Even if you advertise in another magazine.

Ivan: Every time I get a catalogue I have another list of names to send in. We need to be able to get information to our friends.

Marlys: The catalogues should be in much more prominent places.

Dean: But Deanna's comment is a good one, like how do you get to know about it [Elderhostel] if you don't know about it! I don't think they are advertising in seniors magazines because they [Elderhostel] think that the people attending Elderhostel are not reading these magazines!

Group: .....Big laughter .....

Ivan: Put on the front of the catalogue "PASS ON TO A FRIEND"

Simon: Elderhostel will send you a pack of cards you can just add a friends address on to it and they will send out a catalogue.

Lola: Oh that's what I need.

From this one dialogue we learn how important it is for non-participants to have access to Elderhostel information, and of the need of return participants to have something to share and pass on to a friend as they promote the organization via word of mouth. Word of mouth advertising also appeared to be an extremely powerful source of information for participants, as Gary says,

> word of mouth is the best way to recruit new members, if you try it once and are satisfied, you are sold on it. A magazine can't do that.

There is however a need for printed material and participants offered a range of suggestions including card inserts, sign up a buddy incentive program, and advertise through a variety of different venues.

One bone of contention concerns the fact that Canadians do not have equal access, at the same cost, to the American catalogues and some participants indicated that this has a negative impact on their ability to make a fully informed choice. Several Canadian hostellers agreed with Alain when he said,

> We don't get the big catalogue [USA]. I can't believe how many Americans are here, but it is because they saw the program, they get the whole program and we just get the little one.

Equal access to information was echoed by some American participants who realized, once in Canada, that the range of programs available in this country were greater than those advertised in the American catalogue. The frustration of sharing information was also expressed by every site coordinator I spoke with, some of whom receive as much as 75% of their Elderhostel business from Americans.

A request for more detailed information was heard from *'the vacationer'*. Sandra and Ray, are first time participants, living in Georgia, who were trying to decide between a several Canadian sites. They were looking at adding their first Elderhostel to a pre-planned vacation up north to visit their son. Sandra told me,

> The biggest frustration we had was trying to get information from Boston. They could only give us the phone number of the site coordinators and when we called the site we felt we weren't getting all the answers we wanted. It was as if, if they told us, we might not come. So we came in good faith, but when you are driving from Georgia to Canada you don't want to be disappointed, and I would have liked more information.

Regarding the quality of the information, some participants were concerned about the content of the printed information available to them. I often heard people speak of *'coded descriptions'*. It did not take long to learn, from participants, site coordinators, and regional directors, that *'coding'* does exist. Martha described it this way,

> Let's face it, the information which is sent out is not exactly 100% correct. I'll be specific. I have a heck of a hard time reading course descriptions if they are writing to make it sound cute to attract people. Now this may not be good for Elderhostel, but I myself would like more factual information.

This *'coding'* of site descriptions by Elderhostel coordinators and the *'decoding'* of the descriptions by participants was a source of many humorous conversations, but, the bottom

line is that inaccurate information, or the perception that the information is incorrect, impacts on a person's ability to make an informed choice.

The utility of catalogues, that range in size from 88 to 160 pages and are distributed quarterly, was also a major point of discussion. Alice told us,

> Being a senior citizen, I find reading the large catalogue is kinda like reading the bible or a telephone book. If they could have something that separates things by interest ..... [interrupted by roaring laughter and general agreement in the form of head shaking].

The need for subject indexing was a major theme in this study. Many felt that the inclusion of an index, to enhance the geographical listings, would greatly improve their ability to make their site selection. A few even suggested modelling the catalogue after a time share catalogue (Interval International, 1995). This would allow one annual catalogue to be mailed to all participants, all over the world, followed by regional updates as they become available or as requested.

I discovered that the younger Elderhostelers were not interested in sifting through huge catalogues, with small print, to make their site selection. Most participants already have an idea of where they want to go and what they would like to study before the catalogue ever arrives. The older Elderhostelers confessed to enjoying the catalogues as a source of leisure reading, but again, when the time comes to select a site, they also indicate that, indexing would be helpful. Jean, made this comment,

> They could index things by interest, for example Gourmet cooking. I'd like to see it listed instead of having to wade through everything to see what is there and also maybe they could use one catalogue for all North America. Indexing would be great because I have certain interest areas and I could go down and say ..... that. As it is, the catalogue is too much to look at.

Finally, the timing of the catalogue distribution was a concern for many. Based on my present understanding, many participants decide six months to two years in advance about their location, then they wait to play the *'Elderhostel Lottery'*.

Summary of the Decision-Making Factors

This section has defined and described the fourteen decision-making factors identified in this investigation: location, travel, program, course content, accommodations, cost, dates, negotiate with travel companion, social, sites, organization, personal requirements, escape and information. I have attempted to illustrate, as often as possible, the dynamics of these factors through the participant's voices. If one reflects on the length of time it takes just to describe these factors, one begins to gain an appreciation for the magnitude of the goal, understanding the decision-making process in education. However, a critical first step has been taken. What lies ahead is the exciting possibility for future researchers, and members of the Elderhostel community, to examine the factors I have presented here and to challenge, refine and improve upon them. A summary of the fourteen factor definitions is located in Appendix I.

Sequencing the Decision Factors

The analysis, about how the decision factors are sequenced, was completed during the time that the fourteen criteria were being defined and refined, and after the fourteen major decision-making criteria had been isolated. The transcripts were reviewed, and descriptive phases dissected and interpreted. When the definitions were broad and generic, this task was relatively simple, and 46 patterns were readily identified (Appendix H). However, once the factors were fully defined, this task of unravelling the true sequences became more complicated for two reasons. First the focus group moderators, myself included, often recorded the factors in point form, or asked people to name the three most important criteria when making a site selection. This led to numerous responses that were void of context (and of less value in retrospect). For example: location, program and cost, or subject area, location and dates. The second reason for the difficulty in unravelling the decision-making process was because some participants were elaborate with their sequence descriptions, others were not. To illustrate this point I have selected five quotations. I have also included how I would interpret these comments, in consideration of the fourteen factors previously discussed. The first comment comes from Dick who told us that, "the

first thing I look for is RV facilities." That was all he said! My interpretation: Factor 1: Accommodations (need for RV facilities).

Had all the participants been so succinct the task would have been quite simple, yet we would not have gained the depth of understanding required to appreciate this complicated process. This second example better represents how some participants described the way they make their decision. Elaine told her fellow participants that,

> When the catalogue arrives, first thing is location, then private bathrooms, golf courses, woods and seashore are attractive, I get sleepy in lectures so extra curricular activities are important to my decision, attaching Elderhostel to other travel plans and accommodations are important to my decision.

My interpretation: Factor 1= location (geographical and area assets); Factor 2 = Personal Requirement (sleepy in class, therefore require activity); and Factor 3 = Program (balance of course offerings which includes activities outside the class); and Factor 4 = Travel (attaching the Elderhostel experience to existing travel plans). A third description comes from Gloria,

> We did it by word of mouth. Some friends of ours had gone to Elderhostel and thought it was great. We did not want to go to the one she went to, so we got the catalogue and the content and the location were all pretty important and the price. I think any of us who have done much travelling know this is one part.

My interpretation: Factor 1 = Information (word of mouth recommendation); Factor 2 = Social (influence of friends); Factor 3 = Course Content; Factor 4 = Location; Factor 5 = Cost. A fourth decision-making sequence was described this way,

> We'd been receiving Elderhostel catalogues for sometime and never took it upon ourselves to make a decision. Finally, last year we made a decision and I think the reason we went there was that we could drive and it tied in with visiting folks we used to know. This year's location was really based more on timing, we had a time frame that would tie in with our vacation. Time frames first, and an activity that was not cerebral, but physical. After a life-time of working, you are brain dead and I needed something outside.

My interpretation: Factor 1 = Travel (one-tank-trip); Factor 2 = Location (area assets); Factor 3 = Dates (time frame fitting with scheduled vacation); Factor 4 = Program (require

physical component, looking for a program structure that includes classroom and practical activities). Finally, Irene, who was travelling with her brother-in-law, had this to say,

> We choose this partly as well of the time frame but in fact, we planned the whole rest of our time around this one because it was the only one possible with the date and we were visiting relatives and doing some of our own thing. We are far from home, so our thought was, since we are visiting relatives, it would be a wonderful opportunity to take in an Elderhostel, it was feasible with our holiday plan. Rather than do 2 or 3 back-to-back, because it's sort of expensive to fly this far ... and I think the hiking part of it was appealing to us because we've always enjoyed walking. The Elderhostel part of it is appealing because we are both people persons and that is as much a plus, just the participation with everyone from all over, its just a real asset. I've been on one other and it was fun. This is different as my husband passed away, but it's very feasible given my new circumstances.

My interpretation: Factor 1 = Social (the enjoyment of the Elderhostel atmosphere, acceptance of the widower); Factor 2 = Dates (only possible dates); Factor 3 = Location (area assets); Factor 4 = Travel (vacationer, add an Elderhostel experience); and Factor 5= Course Content (hiking class).

When reflecting on how people make decisions, as mentioned earlier, I feel that two factors, social (#9) and organizational policies and philosophies (#11) lay like a blanket over the decision making process. These factors, in general, relate more to the intrinsic value of the Elderhostel experience. The other factors are more extrinsic, pragmatic, and therefore can be commented on more easily. Andrea captured this distinction when she clarified,

> I should have said, as my first reason for coming, was that Shauna invited me [social], then I said, sure let's go.

During numerous conversations I tried to get people to pin point this type of beginning. It was only when a specific question was put forth, such as "didn't you first decide if you were travelling with your husband or friend?", that people were able to think back, respond and ultimately confirm that they don't think to articulate some of the earlier decisions they make, it is easier to remember the big factors like location, program and cost.

Despite the challenge that unravelling the decision-making process posed, two general patterns were frequently heard. Lorne told us that he was mixed,

> I picked Jasper Park because I wanted to go there, but I picked Montreal because I wanted to go to the Jazz classes, so one is location, the other is subject.

The alternate pattern was described by Marc who indicated that,

> Subject and location together are number one, I need the right subject in the right location, and the rest I don't care about.

When participants were asked to think beyond this current experience and consider if future decisions would be made the same way, the task became more difficult. Generally the conversations went off track and returned to a discussion of a specific learning interest, a desire to see a geographical location, or pondering about where one might go the next time.

One conversation that was recorded, I feel, does reflect a general approach many participants use when making their Elderhostel selection:

Gordon: I think when you get the Elderhostel magazine it's just like voting for somebody. Very seldom do you ever vote for anybody, you vote against someone else! [roars of laughter from the focus group].

Randolf: We know there are things we don't want.

Gordon: Right, you go through the magazine first and eliminate all the programs you wouldn't be interested in and then you end up with a list. Then my wife and I sit down and I mark what I like and she marks what she wants to do, and then we fight! [another roar of laugher, and small talk of acknowledgment].

Lydia: I think it's good each of you make your decision then you sit down and compromise.

Despite the difficulty the request to identify future decision-making sequences posed, I feel three general statements can be made. First, there are external influences that impact the need to change the sequence and priority of the decision-making factors. These influences include a change in general health (adapting to the aging process), a specific change in one's physical abilities (the need for a hearing aid, walking cane), a change in personal

interests (looking for a new learning experience), and coping with transitions in life (need to escape, learn, or socialize).

Second, I can state with confidence that first time hostellers (one to three sites) have a very difficult time projecting which criteria would most strongly influence a future Elderhostel site selection. On the other hand, experienced hostellers (those who have attended four or more sites) have a particular procedure which they follow and many identified that this process remains quite constant, even though they could not actually articulate in detail what the process was. Finally, site selection is partially a process of elimination. Individuals have certain criteria in their mind when they set out to explore the catalogue and, based on these criteria a limited number of sites are selected, then these choices are narrowed down based on even more specific criteria and comparisons between the sites.

This discussion of how factors are sequenced could be criticized for the subjective nature of the analysis. In my own defence, and in defence of the qualitative research methods, it is important to restate that this analysis followed a very specific process, Moustakas' (1990) five basic phases of phenomenological analysis: immersion, incubation, illumination, explication, and creative synthesis. This process is highly reflective, incredibly time consuming, occasionally frustrating (because you must read, and re-read the transcripts so many times), yet it is a dynamic process, out of which falls clarity, definition, and a rich understanding of the data.

As this was an exploratory study, its purpose was not to articulate the weight of the various factors, that is a challenge for my PhD study or future researchers. The purpose was to gain an understanding of the factors and try and learn how these are sequenced in people's mind. It would be inappropriate, at this time, to attempt to rank order or speculate on the importance of the one criteria over another.

Summary

This chapter has presented a demographic profile of the participants who contributed to this study, identified and defined fourteen factors which influence the

decision-making process, and discussed the complexity of understanding how decision are made. Throughout this chapter I have referred to *'major themes'* that emerged while in the field, or during the analysis. Each of these themes impacts a particular decision factor, but not every theme has an impact on every individual or decision. The purpose of this list is to focus the reader's attention on the most dominant themes in this investigation:

1. The distinction between the *'one-tank-tripper'* and *'the vacationer'* (Factor #2);

2. An interest by participants and site coordinator to have programs structure based on the concentrated learning format illustrated in Table 4.5; (Factor #3);

3. A need to incorporate more variety in the levels of learning (Factor #4);

4. A concern for over the availability and cost of single accommodations (Factor #5);

5. A concern for how the large age span between participants will affect the social element of the Elderhostel experience; (Factor #9);

6. Concerning the catalogue:
   a. Include a subject index,
   b. Write accurate catalogue descriptions,
   c. Equal access to site information across North America (Factor #14); and

7. Find ways to help and support *'hooked'* Elderhostelers who enjoy promoting the organization and try to recruit new participants via word of mouth (Factor #14).

Chapter V

The Participant Typology

The development of this participant typology was a rather visceral experience. When I set sail on this journey I wasn't even sure if the older adult learner could be represented in a typology. However, it wasn't long in the field before I started to develop what I first called *'characteristics groupings'*, people who seemed to share similar interests, behaviours or attitudes. The trick was to label and define these groups of people, and often the label didn't come to me until I met an individual who epitomized all that was swirling around in my mind.

The purpose of this chapter is to portray six different types of participants who emerged during this qualitative research experience: (1) the activity oriented, (2) the geographical guru,(3) the experimenter, (4) the adventurer, (5) the content-committed, and (6) the user. Appendix J provides a summary of this typology.

The genesis for this typology cannot be credited to the information received from the research question that asked, **"How is the choice of program related to the kind of person you are?"** In actual fact, people had great difficulty with this question and during the very first focus group, one member of the research team, who had helped evaluate the protocols, accurately pointed out that the probes didn't make sense to the participants. I remember one man saying, "I don't know what type of person I am, that's for you to decide".

Ultimately, the typology emerged from feelings and hunches I developed while in the field, then later confirmed when working on the analysis. I listened to how people described their decision-making process, heard what was important to them, then recast this information back to other participants. It was this hermeneutic circle of dialogue that first led to me to identify eleven types of people. Further analysis and discussions with participants led me to conclude that these original eleven types actually provided two different explanations: (1) what types of programs are of interest, and (2) how participants

go about choosing a site. The categories that relate to programs of interest became the foundation for the participant typology. Two of the original eleven categories that related to how participants choose a site are, in reflection, descriptions for the *'travel'* factor, #2. The *'one-tank-tripper'* and *'the vacationer'* were such strong themes, that perhaps it explains why I originally thought they belonged in the participant typology. I realize now that the *'one-tank-tripper'* and *'the vacationer'* are two groups of Elderhostelers who, early in the decision-making process, decide how far they are willing to travel for their experience.

The activity oriented person is best described as the type of person who "while I can move, I want to keep moving, I'll have lots of time to sit down later"! This person selects his or her Elderhostel site based on the fact that there is an activity component included, they *will not*, under normal circumstances, register for a program which has three sessions held in the traditional indoor classroom. The activity oriented person however, does not just describe the athletically inclined, although the sports motivated often fall into this category. The activity oriented person wants to be outdoors, exploring and learning in the natural environment. This learning may be sports related, such as golf, hiking or tennis, but it also includes activities like exploring the seashore and bird watching, to name a few. The activity oriented will usually look for a program with a learning theme, they are interested in learning a subject in the classroom, then experience the learning in nature's classroom. The activity oriented participants were the ones most interested in the concentrated learning program structure, not currently available.

Janet, a member of our research team, without knowing it, wrote a marvelous synopsis of the activity oriented person. She wrote that physical activity seemed to rate significantly at the site she moderated. Participants enjoyed the opportunity to walk and explore, enjoy field trips, and get around to *'see"* what they were learning about. These people are not interested in classroom lectures or pictures, they want to experience the area, to walk in the canyons and touch the moss and plants. They will look for a course that will take them outdoors and into the environment. The need for physical activity in all Elderhostel programs was emphasized.

The geographical guru is the person who will tell you "If I wanted to go to a place, I wouldn't care what the program was". They select a site based on the fact that they want to visit the area or region. What draws the geographical guru is the opportunity to see and explore a new area and learn about the local area and sometimes that's all they consider.

> I'll take a lot of programs I don't like because I want the location. Even if they are studying basket weaving, if I want the area I'll go because I know I'll learn something.

This is not to imply however that there is no interest in the program. Some geographical gurus have specific program interests, the most common relating to the location,

> If I'm going to be traveling very far, I want to learn about the area I'm traveling to, the courses have to relate to the area!

All three program structures discussed in factor #3 appeal to the geographical guru, particularly the learning theme.

The experimenter is the novice time participant who wants to explore the different possibilities that Elderhostel has to offer. Their first experience is close to home (one-tank-trip) for two major reasons: to keep the initial financial investment low, and to ensure an option exists to 'retreat' if they are not enjoying themselves. This built in safety factor, knowing they can leave, is *extremely* important to the new participant. The experimenter is also interested in a little variety,

> This is my first Elderhostel and it is an activity site [golf], the next time I'd like to try the other one [classroom] just for comparison

Additionally the new participants seldom travel alone. It was not uncommon to hear a new recruit say,

> For my first experience I didn't want to travel alone, but after this experience, I think I can go elsewhere on my own.

Finally, the experimenter worries about the *'academic'* level of the learning experience. Jim, attending a site with hiking and learning about nature, put it this way,

> We choose this site because we didn't want one too intellectual, we thought this would be fun.

Novice participants know that Elderhostel classes have a reputation for high-level quality learning and they want this opportunity, but, many are afraid of re-entering the classroom. This fear directs the majority of experimenters to choose a site with classes in a subject where they have some pre-requisite knowledge, or they look for programs with physical activity. Gregory, attending the same site as Jim, shared this insight,

> For our first one we kind of wanted to dip our toe in the water a little bit and didn't want to bite off something that would make the experience distasteful, so we thought .... what can we do? We can walk! [huge laughter from the focus group participants] ... and it's not a far drive to get to that spot.

The adventurer is the person who will describe themselves as

> the kind of person who likes to try something different. I can't say exactly which program I'm choosing, but it's something that I've never done before and would be interesting.

The adventurer is willing to go anywhere and try anything. They are looking for new experiences in learning, socializing, and travel. As Darlene exclaimed in the discussion group,

> I'm very excited about the program, all horizons are opened. I'm flexible with my decision making, though I do still find mountains and water appealing

Some adventurers even confessed to sacrificing on the quality of accommodations just to enjoy a new experience. When I think of the adventurer I think of the *'jack of all trades'*, the *'happy wanderer'* and the *'smorgasbord diner'*! The adventurer enjoys both the mixed learning and learning theme program structure.

The content-committed participant is the person who is willing to travel anywhere to find a site with a program that supports their learning interest. This person is interested in quality instruction at a university level and meeting people who share their passion. The content-committed would rather wait until their subject becomes available, than attend a site with subject areas of less interest. One genealogist I spoke with indicated that he chose the site specifically because the subject area supported his genealogical interests. The location had an added benefit of furthering his personal family history, however, but had

the topic of the lectures not related specifically to his learning needs, he would have waited until something a little more appropriate came around. The content-committed is the one most strongly interested in a learning theme program structure. The mixed theme holds limited appeal because the subjects are often not related, and therefore cannot support their focused learning preference.

The user is the sixth and final type of Elderhosteler identified in this study. This person is not interested in the Elderhostel program, rather he or she uses Elderhostel as a cheap holiday, a bed and breakfast, or a means to some other end. The user sticks out like a sore thumb and is often ostracized by true Elderhostelers. I encountered three such individuals while in the field and concur with Alain when he says:

> Oh yes, you can spot a fraud a mile away, true Elderhostelers don't appreciate these types of people filling the places. We were at one site where this person used Elderhostel as a cheap room and board for a house hunting trip and showed up only for meals. This is not a good plan.

I was very fortunate to have the opportunity to have one *'user'* agree to an in-depth interview. Ginette was not happy with her Elderhostel experience, she didn't want to participate in the activities, and she felt that if she agreed to speak with me, she would have a legitimate reason for missing class. Ginette was, in many ways, like the other first time participants. As a widower, she traveled with a friend, she was within a *'one-tank'* driving distance from home, and she had some pre-requisite knowledge with the subjects being offered at this particular site. Where she differed was in her attitude, her reason for being at Elderhostel, and her expectations for the program. Her continuous complaints often centered around the fact that there were not enough tours scheduled in the week, she didn't receive her *'travel'* information soon enough, and she was annoyed when to learn that class attendance was not only expected, it was the norm, the reason why most people attend Elderhostel.

Summary

This participant typology has described six different types of people, the activity oriented, the geographical guru, the experimenter, the adventurer, the content-committed and the user. This typology is based on how participants choose their programs. Intuitively, I feel this typology has room to grow, to seek deeper understanding of these types of people. Like the decision criteria, it is a starting place to better understand what types of people choose the different educational programs and how they go about making that decision.

Chapter VI

Conclusion

The social context has changed, research methods have evolved, and the opportunities to continue learning throughout retirement, I believe, will increase. The possibilities are just starting to unfold for persons of the *troisieme age*. Slowly, the stereotype of the decrepit senior citizen is changing. Today's seniors can be described as vibrant and active; they eat pizza, recycle garbage, remain socially and politically active, they enjoy travel, and the opportunity to learn (Live it Up, 1993). People are living longer, and despite the fact that health issues associated with aging inevitably impact on how elders will live their lives, there are an increasing number of opportunities for senior members of our society to enjoy intellectual and physical stimulation during their retirement years.

The purpose of this study was to gain understanding about how older adults, who are retired or contemplating retirement, make decisions regarding their educational experiences. Through an inductive qualitative inquiry with Elderhostel participants, this study reveals, defines and explains the dynamics of fourteen major criteria associated with the decision to attend Elderhostel. By examining how these factors are sequenced, the complexity of the decision-making process was exposed and a typology of six Elderhostel participants emerged. This final chapter discusses these findings, shares the major lessons learned, and looks at the opportunities which lie ahead.

Discussion

The population is aging and it is time to focus attention towards understanding the educational needs of the older adult (Thornton, 1992; Pearce, 1991). The bulk of past research has been quantitative and focussed on examining the participant motives of adults and older adults and learning outcomes. And while decades of studies, which replicate snap shots in time, and build on knowledge using similar inquiry instruments, have provided a plethora of information, there has been relatively little adult education research that has

branched out to examine the phenomena from a different perspective. This study went beyond quantitative replication and qualitatively explored the decision-making process, an area of study in its infancy and used a research tradition that has grown in acceptance.

Henry and Basile (1994) are the only other researchers to date, that I could find, who have studied decision making in adult education. Romaniuk and Romaniuk (1982) identified and prioritized fourteen factors associated with the decision to participate, but did not go beyond and attempt to understand how they impact the decision-making process.

Henry and Basile's study compared participants in formal university adult education courses with non-participants, people who requested information but did not register. Although their sample population was different, and their study was quantitative, some similarities exist with this study. First and foremost, both studies agree that the path to understanding how decisions are made is complex and that the factors which influence the process vary in type and strength. However, the purpose of neither study was to determine the strength of the decision criteria, this is an area for future research.

Henry and Basile focussed on comparing the difference between participant and non-participant responses to a pre-set list of criteria. Based on their findings, three common factors exist between our studies. Meeting new people (social #9) and general interest (#12) were found to have a positive influence on the decision to attend with both Elderhostel participants and university adult education students. The third factor, escape (#13), however varied. Henry and Basile found that coping with major changes in life (e.g. death or divorce) served as a deterrent to participation, while this investigation revealed that some people register for an Elderhostel program to help them cope with an unpleasant reality of their regular lives. Registering in an Elderhostel program was viewed as a healthy, positive, and socially safe distraction from events in one's regular life.

Finally, Henry and Basile attempted to gain insight regarding the relationship between the influence of institutional perception, but were unable to draw any conclusions through their statistical analyses. They did comment in their conclusion however that they felt this dynamic existed, but their inquiry did not allow for feedback on this element to

emerge. This study, while not setting out to determine the influence of institutional perception, discovered that it is a fact considered when making the choice to attend Elderhostel. To the best of my understanding, one of the reasons new participants are attracted to Elderhostel is because of the positive impressions they have of the organization and its programs. This perception has two roots: (1) the positive reputation of the organization and (2) personal endorsements from family and friends who boast the merits of Elderhostel via word of mouth advertising. Considering the return participant, it would be safe to say they have a favourable perception of Elderhostel, they are *'hooked'*, or at the very least, nibbling at the line. The new participants, who I believe will not return, are those who's expectations and impressions of an Elderhostel experience were not met and consequently they became disenchanted.

Romaniuk and Romaniuk (1982), the only other researchers to compare new and return Elderhostel participants, found that the desire to try something new may be more relevant to new participants. Based on my understanding from this investigation, I would disagree. The interest in trying something new relates more (although not exclusively) to a type of person – the adventurer– rather than a specific participation motive. Romaniuk and Romaniuk also discovered that the underlying features of the Elderhostel program become more important to experienced participants, and I agree. Experienced hostellers are familiar with the social norms, the quality of the educational offerings, and highly value the learning experience. These all have a positive influence on the decision to return to Elderhostel, these criteria however, do not have a strong influence on actual site selection. This decision appears to be surrounded by more pragmatic factors such as cost, dates, and method of travel.

Continuing along this line of thought, it is important to recap that this study revealed two decisions that hostellers make: the decision to attend Elderhostel and the choice of a specific Elderhostel site. The decision to attend Elderhostel is a sub-conscious decision for most, those who are *'hooked'* and satisfied. Decisions related to social needs (factor #9) and aspects specific to the Elderhostel organization (factor #11) are not even discussed, they are assumed. Not everyone however, falls into this category. This study

made two discoveries that could negatively impact on a participant's decision to return to Elderhostel: level of learning (factor #4) and aging (factors #5, #9, #10).

Elderhostel first offered programs in 1974 and has built a faithful group of followers. In this study alone, 12 participants had attended anywhere from 15 to 20 sites. Some of these people are the content-committed, interested in taking their knowledge to deeper depths in a specific subject area. These participants have found that the level of learning they are interested in is not available, so despite their love for Elderhostel, they are not convinced the organization can still meet their learning needs. For this sub-group of the content-committed, this is an important decision criteria.

Participants concerned about certain aspects of aging also must decide if Elderhostel is still a program they can enjoy, for as many participants pointed out, there are three major concerns associated with aging which influence a participants decision to return. The first relates to accommodations, finding a location which can cater to specific physical needs. The second concern relates to the responsiveness of the site coordinators to schedule activities in close proximity to each other to minimize the walking challenge some participants face. As well, certain participants identified a need for educators to enhance their lectures by using microphones, good quality visual aids, and paraphrasing techniques. The final age concern relates to the 43 year age span witnessed in this investigation and the effect this has on the social fabric. Participants concerned with any or all of these aspects of aging, must first decide on Elderhostel before they can choose a site.

If a participant has already made the decision to attend Elderhostel, the choices that then must be made concerns which program offers the best courses to meet an individual's needs. The factors discussed most often related to practical considerations, many of which are consistent with the motivation factors reported by previous researchers. A comparison of the 14 decision criteria discovered in this study with the 17 motivational factors summarized in Table 2.1 informs us that the interest in learning and being intellectually challenged are two of the dominant reasons why people enrol in adult educational activities. The other common factors are fulfilling instrumental and social needs, following a specific course, enrolling in education to escape some aspect of the participant's private

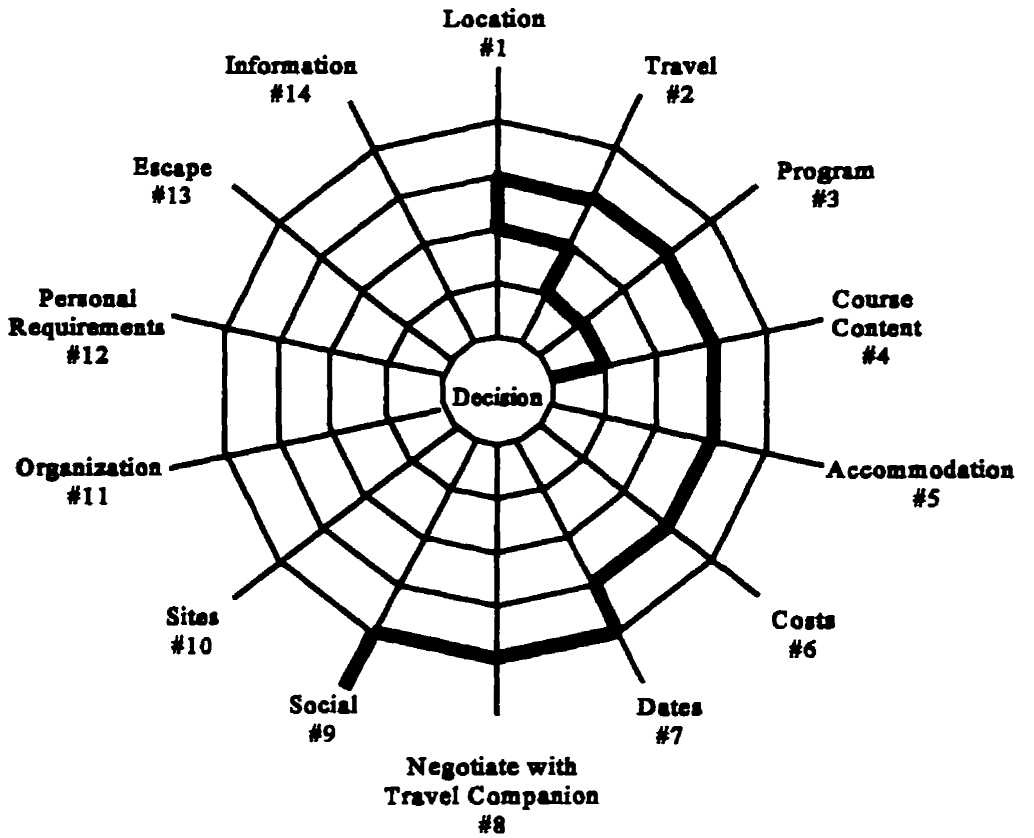
life and other personal reasons. The location, travel, characteristics of the site and accommodation factors identified in this study were, not surprisingly, different from the general adult education literature. They had however, all been discussed by one or more previous researcher who studied Elderhostel (Adair & Mowsesian, 1993; Romaniuk & Romaniuk, 1982; Murk, 1992; Swedburg, 1991b; Rice, 1986). The two new factors that emerged in this study were the need to negotiate one's Elderhostel site selection with a travel companion and the impact of certain Elderhostel policies, such as the *'Elderhostel Lottery'* and new age eligibility policies.

Learning is seldom an end it itself, it is a vehicle through which a person can meet a variety of personal and developmental goals (Adair & Mowsesian, 1993). And as a result, any attempt to understand the factors that motivate and the factors which influence the decision to choose an educational program or specific course becomes a complex and monumental challenge.

When I began this investigation, a dear friend and I brain-stormed to create a concept map for the decision making process. After many humorous attempts we settled on a spiders web with five anchor points: product, price, place, promotion and people. As I reflect on the knowledge gained from this investigation, I believe that the concept of a spider web still reflects the decision process, but instead of being anchored by the *"5 P's"* (a marketing framework), the decision web I now envision is anchored by the fourteen decision criteria identified in this study (Figure 6.1).

To reach a decision, the centre of the web, a person begins at one of the outer most anchor points. Each time a decision is made, the person moves one step closer to the centre and around the web to a different anchor point (decision factor). Anchor points/decision factors may be revisited. Once a decision is taken on this factor, the person can again move closer to the centre of the web, select the next factor and make a decision. Ultimately every person will reach the middle and a final decision will be taken. For some people this process with involve several complicated decisions, for others the process may be quite simple.

Figure 6.1 *The Decision Web*



To illustrate, lets revisit the decision sequence described by Irene, who was travelling with her brother-in-law.

> We choose this partly because of the time frame but in fact, we planned the whole rest of our time around this one because it was the only one possible with the date and we were visiting relatives and doing some of our own thing. We are far from home, so our thought was, since we are visiting relatives, it would be a wonderful opportunity to take in an Elderhostel, it was feasible with our holiday plan. Rather than do 2 or 3 back-to-back, because it's sort of expensive to fly this far ... and I think the hiking part of it was appealing to us because we've always enjoyed walking. The Elderhostel part of it is appealing because we are both people persons and that is as much a plus, just the participation with everyone from all over, its just a real asset. I've been on one other and it was fun. This is different as my husband passed away, but it's very feasible given my new circumstances.

In order, the five major factors identified in this dialogue were: (1) social, (2) dates, (3) location, (4) travel, and (5) course content, and represent five decisions. Although not the first point spoken, Irene tells us she chose an Elderhostel experience because of the people, the fun, and because as a widow, she knew she would be welcomed and feel comfortable (decision 1). This decision complete, Irene moves into the first layer of the decision web and over to the next most important factor, dates (decision 2). The time frame, she indicated, is influenced by a visit with relatives. Once the dates are confirmed, Irene moves closer to the centre of the web, and over the factor labelled geographical location. Here she makes a decision based on the fact that family is in the area (decision 3). Her next decision concerns travel (decision 4), she chose to fly. The final decision Irene shares concerns the Elderhostel course offerings (decision 5). And this brings her to the centre of the web.

As one first reads about Irene's journey into the decision web, it would appear that her choice involved five major decisions. In actual fact, there was at least one more fact she did not articulate and possibly two. The first *'missing'* factor is personal (factor #12). We know from the audio cassette that Irene is travelling with her brother-in-law, hence a decision was made to travel with a partner. The second *'missing'* factor is to negotiate with travel partner (factor #8), but based on the dialogue we heard we can't tell if Irene and her brother-in-law negotiated their site selection, or if they happened to agree, in which case this factor would not be relevant to this Elderhostel decision.

My purpose in mentioning the possibility of missing factors is to illustrate how easy it is for a participant to forget to mention one or two criteria when describing which factors influence their decision and how these factors are sequenced. It is only through knowing a person's full story that the decision-making process can be understood.

So where does this leave us? With the knowledge that this study has identified, defined, described fourteen major factors in the decision-making process. This investigation also highlights that further research is needed if we are to gain a deeper understanding of this complex process. This study opens the door for many exciting future research projects. Projects which can focus on examining the dynamics of each decision criteria, studies which can determine which factors are most critical to the decision making process, or

studies which try and trace the path one travels into the centre of the decision web. To conclude this discussion, I would like to state that in order to advance our understanding of the decision-making process, it is essential that we embrace the traditions and research methods of an integrated research paradigm. Draw on the strengths each approach has to offer and to examine this complex phenomena from many different perspectives.

Lessons Learned

In qualitative research it can be an asset to have a tacit understanding of the phenomena under study (Altheide & Johnson, 1994). Strangely enough in this case, the fact that I had no previous exposure to Elderhostel, was an advantage. I was able to approach the investigation with no preconceptions and no personal attachment to the organization. My mind was like a new computer hard drive, ready to receive, file, and organize data. For me, this was a once-in-a-lifetime research opportunity for I shall never again be able to look at the Elderhostel organization and the decision-making process from the same perspective. Lessons have been learned, new knowledge has been constructed, and opinions have been formed. Fortunately this is not negative, on the contrary, it creates a framework for more informed future investigations. There are four lessons I would like to share. The first lesson involves the use of multiple stakeholders, the second and third concern the methodology, and the fourth pertains to the questions.

This study began with the National Director of ELDERHOSTEL Canada stating that he wanted to have a national focus, involve people from his office, regional directors from all five regions, and diversity in the selected sites. He also encouraged me to maximize my time in the field by talking to as many people as possible over meals, coffee breaks, between classes, and during the participants' leisure time. As a result, the perspective I have today has been influenced by the participants, site coordinators, volunteer coordinators, regional directors, national office staff members and ELDERHOSTEL Canada's three senior managers. I can't emphasize enough how important it has been to hear the views and perspectives of people from almost every level of the organization, for it facilitated both a macro and micro understanding of certain issues. The importance of

involving multiple stakeholders in the research process is the first and most valuable lesson learned.

The second lesson, or rather set of lessons learned, relates to the methodology. The combined use of focus groups, in-depth interviews, and participation as an *'Elderhosteler'* at three sites was an effective way to gather information. For me, the focus group served as the ice-breaker. It brought the participants into the research, explained my presence, and provided an opportunity for participants to share their experiences, tell their stories. This inclusive, participatory approach to data collection generated tremendous interest by all those involved and I was reminded, often by participants and site coordinators alike to ensure that the findings were published in locations "where real people read and not just academic journals". For the Elderhostel staff members who participated in the focus groups as moderators and assistant moderators, they had the opportunity to listen, interact, and talk with their clientele. Each member of the research team indicated that this forum was both informative and interesting, despite some of the technical difficulties we all shared.

The in-depth interviews were useful, necessary, extremely informative, and challenging. The invitation to participate in a *'scheduled'* private interview went against the social norm of Elderhostel, which knits people together, does not single people out. Consequently, most of my interviews occurred over a cup or coffee, while congregating before a meal, en route to an activity, and yes, a few did agree to schedule a formal interview. Another challenge was the fact that most people did not agree to the use of an audio recorder and many were uncomfortable if I took notes during our conversation. As a result, I found the best approach was to mentally prepare the questions, literally 'target' an individual in an open location, then seek permission to speak with them, and immediately after the interview, excuse myself and record or write my follow-up.

Spending time in the field proved to be extremely valuable for four reasons. First it allowed me to get to know people, which greatly enhanced the detail and honesty of the information they choose to share. Secondly, by participating in the activities as an Elderhosteler, I was able to experience the social phenomena and *'get hooked'*. Thirdly, I had time to listen and reflect on what people were saying, re-organize my understanding of

emerging themes, then recast new questions out to participants. And finally, spending a full week at a site greatly enhanced my ability to understand the unspoken, more tacit elements of the decision making process. By weeks-end, I knew most of the participants, had spoke to them several times, and had an understanding of their personal interests and reasons for attending Elderhostel. This knowledge made the final 24 hours invaluable, for it was during this time that participants would discuss where they planned to go for their next Elderhostel experience and why. The criteria and decision-making sequences were literally thrown into the circle of dialogue and all I had to do was listen, make mental notes, then quickly record what I heard.

The third lesson learned relates specifically to the scheduling of focus groups. There is no question in my mind concerning the value of this format for gathering information with Elderhostel, the difficulty concerns scheduling. As one regional director stated,

> Many of these people are at a site as a once-in-a-lifetime opportunity, they have spent a lot of money to come, and we know from our stats that returns to a site are minimal.

To ask site coordinators to schedule focus groups into a full agenda is challenging and many felt that asking participants to give up one hour of their time, was asking a lot.

The best suggestion to deal with this dilemma came from Bert, a participant who suggested that Elderhostel continue with focus group discussions, but schedule them in various communities, not at the sites. This idea is appealing for both the researcher and the participant. For the researcher the benefits could include: the ability to invite participants to a focus group in advance and gather background information on those attending, the opportunity to arrange the discussion in a room which is appropriate for focus group research, and the opportunity to schedule the focus groups in a way that maximizes opportunities and minimizes costs.

The opportunity to contribute and help Elderhostel with their research endeavours, without taking away any time from a site visitation is one advantage of community based focus groups. Even more importantly, and in harmony with building on the social dynamic of Elderhostel, community based focus groups offer a forum to unite and introduce participants in a local drawing area. This could lead to new friendships, discovering a new

travel partner, or simply provide the opportunity to share experiences with fellow hostellers in a relaxed, comfortable environment.

The final lesson corresponds to the importance of asking the right questions. Focus groups ask only a few questions and they are difficult to write. The question must guide conversation in a useful direction and open a stream of thought which will produce synergistic dialogue. As this was an inductive inquiry, and we weren't sure where the investigation would lead, this made the task of writing questions even more challenging.

The questions for this study were developed based on an understanding of the literature, the needs of the organization, and my personal interest in examining the decision making process rather than re-examine participation motives. Through the guidance of an external educational evaluation expert, questions were developed, piloted with members of the ELDERHOSTEL Canada organization, and revised. Despite this preparation, we discovered very early on that the third question posed challenges to the new participant and the fourth question posed challenges to all the participants! The beauty of focus groups, however, is that multiple sessions provide the time and flexibility to modify questions, then recast them into future sessions. In the end, the fourth question had limited value and the third question (which asked if the decision criteria would change for future registrations) was modified to ask "what information do you need to help you choose your next Elderhostel site?"

Future Opportunities

This study opens the door to many exciting opportunities. For Elderhostel, this study provides a new base of information on which to understand the participants in their programs. To practioners in the fields of adult education or gerontological education, this study identifies fourteen decision criteria which can be examined and redefined in different educational settings. And for the research community, this study provides a foundation for future investigators to examine, challenge, and ultimately better understand the decision criteria, the decision-making process, and the participant typology.

In conclusion, I would like restate to that I believe the path to understanding the decision-making process winds like a river, it meanders and gains strength from tributaries along the way. This study began with an understanding of the past, gained strength by examining the present, and we can now look forward to the opportunities which lie just around the river's bend.

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Appendices

Note: Column two lists the sample size used in the analysis, not the original sample. When given, a percentage is offered which indicates the response rate.

Quantitative Studies

Type	Size %	Age	Analysis	Description	Author, Date
EPS[1]	233	--	factor analysis	Motivational orientations of adult education participants	Boshier, 1971
EPS	611	college	multi-variate analysis	Reasons for participation in adult education courses	Morstain & Smart, 1974
Interviews	256	55+	t-test Revising the EIC with older adults chi square	Examining older adult learning goals using the EIC	Hiemstra, 1976
Analysis of questionnaire responses	510	60+	descriptive stats and cross tabs	Analyse participation patterns of older adults	Heisel, Darkenwald & Anderson, 1981
Comprehensive Survey	498 82%			Critical decision motives vary with new & return Elderhostel participants	Romaniuk & Romaniuk, 1982
Mail questionnaire	479 69.8%	$\bar{X} = 34$	factor analysis	Identifying Deterrents	Scanlan & Darkenwald, 1984
Data from the EPS data bank	13442	--	cluster analysis	Houle's typology after 22 years	Boshier & Collins, 1985
Questionnaire	458 89.2%	7%<60 93%: 60 - 89	Descriptive stats, f-test, t-test, chi square	Motivation to participate in Atlantic Canada	Rice, 1986
Mail questionnaire	369 67.7%	40 - 60+	Descriptive Stats	Examining older adult learning goals using the EIC	O'Connor, 1987

Type	Size %	Age	Analysis	Description	Author, Date
LSES[2] SDLRS[3]	64	60+ $\bar{X}$ = 79	t-tests, pearson correlation coefficient	Perceived life satisfaction in relation to attitudes and skills associated with self directed learning	Brockett, 1987
Questionnaire	560	60+	multiple regression analysis	Predictive relationship between participation and learning outcomes	Brady & Fowler, 1988
Questionnaire	490	21%< 65 18% > 75	point biserial correlation	Revising the EIC with older adults	Wirtz & Charner, 1989
Questionnaire	1427 48%	18%> 64 17% < 75	descriptive stats cross-tabs	Elderhostel Alternative Catalog Systems	Market Facts, 1990
Questionnaire	59 74%	53-83	Z-tests	Identified course selection motivation factors	Roberto & McGraw, 1990
Check-list	332 27%	55-91	not reported	Older adult learning activities	Stolze-Clough, 1992
Survey	1e+07	x =34 x= 36	descriptive & logical regression	Decision to participate in formal education	Henry & Basile, 1994

1. EPS: Educational Participation Scale
2. LSES: Life Satisfaction in the Elderly Scale
3. SDLRS: Self-Directed Learning Readiness Scale
4. Participants
5. Non participants

Appendix A: Methodology Summary

Qualitative Studies

Research Design	Collection	Orientation Claim	Description	Author, Date
Case Study	22 In-depth Interviews	--	Three way typology of the adult learner	Houle, 1961
Life Stories	40 In-depth Interviews	Psychological & Gerontological framework	Motivation and expectations of older adults	Wolf, 1990
Case Study	1 Program	--	An Elderhostel Case Study	Murk, 1992
Case Study	7 In-depth Interviews	Phenomenology & Grounded Theory	Learning as a strategy to negotiate retirement	Adair & Mowsesian, 1993

Appendix B: Research Sites

Region	Site #	Type	Sessions
British Columbia	1	Field	1. Walk in the spirit of the natural world
British Columbia	2	Mixed	1. Flora and Fauna of the Shuswap 2. Topography and Geography of the Shuswap 3. Culture and Spirit of the Shuswap
Prairie	3	Field	1. Wolves of the Rockies 2. Alpine Images 3. Pioneer, Painters and Poets of Banff National Park
Ontario	4	Field	1. Discover the Classics of Music 2. "Gouf" (Scottish Term for 'Golf')
Ontario	5	Class	1. Roots and Branches -- Tracing the Family Tree 2. United Empire Loyalists - Roots of a Nation
Quebec	6	Field	1. Classic day walks of eastern townships, Vermont north & nature
Quebec	7	Mixed	1. Jazz, Jazz, Jazz
The Maritimes	8	Class	1. Tides 2. Land of Evangeline /Acadian History 3. Rhododendrons and Azaleas
The Maritimes	9	Class	1. Five Days Before the Mast 2. Nova Scotia Folk Music 3. Researching Herman Melville
The North	10	Field	1. The Inuit 2. Iqaluit: A Modern Arctic Community 3. The Arctic Environment

Appendix C: Focus Group Protocol

Question # 1:

WHAT INFLUENCED YOUR DECISION TO COME TO ELDERHOSTEL?

- ☐ Individual needs:
  - ☐ Meet people
  - ☐ Challenge your mind
  - ☐ Learn
- ☐ Program:
  - ☐ Class based activity
  - ☐ Field based activity
  - ☐ Reputation of program/instructor
- ☐ Geographical/travel:
  - ☐ Near family /friends
  - ☐ Always wanted to visit
  - ☐ Time of year
- ☐ Host institution: ☐ Reputation ☐ Alma Mata
- ☐ Facilities:
  - ☐ Private Bathroom
  - ☐ Shared occupancy
  - ☐ Dining arrangements
  - ☐ Accommodation of special needs
- ☐ Social needs:
  - ☐ Meet other Elderhostel friends
  - ☐ Travel with a friend/spouse
  - ☐ Be near people - similar interest
- ☐ Financial considerations: ☐ Travel costs ☐ Exchange rate
- ☐ Sources of information:
  - ☐ Catalogue
  - ☐ Friends
  - ☐ Recommendations
  - ☐ Regional office
- ☐ Previous educational choices in life?
- ☐ Season / month of the year?

Question # 2:

Now that we know which factors influence your decision .....

HOW ARE THESE SEQUENCED -- PRIORITIZED -- IN YOUR MIND?

..... Take a few minutes to review our list.

- ☐ Does anyone sequence their decision differently?
- ☐ Are their 1 or 2 specific criteria which are always considered first?

Question # 3:

DO YOU THINK THE ORDER OF THESE FACTORS CHANGES WITH EACH PROGRAM REGISTRATION, OR DOES IT REMAIN THE SAME?

- ☐ Think about the way choices were made in the past
- ☐ Think about this particular registration
- ☐ Would you decide the same way in the future?
- ☐ Are the factors different for everyone?
- ☐ Are some factors more critical than others?

Question # 4:

HOW IS THE CHOICE OF PROGRAM RELATED TO THE TYPE OF PERSON YOU ARE?

- ☐ Professional in retirement?
- ☐ Educated?
- ☐ Adventurer?
- ☐ Enjoy physical activity?
- ☐ Individual pursuits?
- ☐ Family person?

Appendix D: In-Depth Interview Protocol

In-depth Interview

June 1996

(1) Hello again and thank you for agreeing to this individual interview.

(2) Purpose of this 2nd interview is to seek additional information on ideas which have emerged as a result of the discussion groups and to learn more about how **'you'** go about deciding on which Elderhostel program to attend.

(3) Interview Rules: ☐ tape recorded
☐ complete confidentiality.
☐ any direct quotations will use pseudonyms
☐ already signed the McGill consent form

QUESTION #1

In the group discussion you mentioned you liked to: _____.

What else do you like to do in Life?

Probes: 1) Educational activities
2) Leisure activities
3) Travel
4) Individual
5) Social

QUESTION #2

Are any of these activities new in the past few years?

Probes: 1) Why did you take up this new activity?

QUESTION #3

(New Participant): Tell me how you feel about this first Elderhostel experience.

(Return Participant): Tell me about previous Elderhostel experience (s).

Probe: 1) THE HOOK!

QUESTION #4

CONTEXT: In the group discussion we had a long list of factors which people consider when selecting an Elderhostel program. (Show a summary list of those mentioned and any additional ones I'd like to toss in for discussion).

☐ Take a few minutes to browse this list

☐ **I'd like to talk to your about these factors and what's important to you.**

SUB QUESTIONS:

4.1) DO YOU ALWAYS USE THE SAME CRITERIA?

4.2) SAME AS IN THE PAST?
If yes - confirm-- ALWAYS?
If no - **Probe:** "Could you tell me the reasons for deciding differently?
"What made you change"

4.3) WILL YOU CHANGE IN THE FUTURE?

4.4) HOW DO EARLIER EXPERIENCES IN LIFE AFFECT YOUR CHOICES NOW?
Probes: Career
Education
Personal

4.5) HOW DO PERSONAL INTERESTS AFFECT YOUR PROGRAM SELECTION?

Probes: Leisure activities
Travel interests
Family/Friends
Desire to learn/study

QUESTION #5

What alternatives to Elderhostel Canada did you, or would you consider?

Probes: 1) Family vacation?
2) Course at a community centre/ university/ etc
3) Leisure activities

QUESTION #6

And finally, how will you decide whether or not to enrol in another Elderhostel program in the future?

Probes: 1) Wait until a new calendar comes out?
2) Decide at the end of this week how much you enjoyed yourself
3) Follow the suggestion of a friend/ spouse?

Appendix E: Demographic Questionnaire

ELDERHOSTEL CANADA: PARTICIPANT INFORMATION SHEET

LOCATION: ***DATE:***

This information is being gathered to enhance our understanding of the people who have agreed to participate in the Elderhostel discussions.

1. Permanent Residence: ☐ Rural ☐ Urban

   Country: _____ Province/State: _____

2. Are you travelling alone? ☐ Yes (skip to number 3) ☐ No

   a. I am travelling with: ☐ Spouse ☐ Friend ☐ Family Member ☐ Other

3. Who made the decision to participate in Elderhostel (check one)?

   ☐ You ☐ A family member
   ☐ Your spouse ☐ A joint decision with: _____
   ☐ A friend ☐ Other: _____

4. Including this program, what is the total number of Elderhostel programs you have attended? _____

5. Year of Birth: _____

6. I am: ☐ Male ☐ Female

7. I am: ☐ Retired ☐ Retired & Employed Part-time ☐ Employed Full-time

8. My preferred place for learning is a: ☐ Classroom ☐ Field site ☐ I enjoy both

Thank you!

Appendix F: Informed Consent

McGILL UNIVERSITY RESEARCH INFORMED CONSENT

This certificate must be signed by all individuals who agree to participate in the *ELDERHOSTEL Canada* Research project.

I have been advised that purpose of this research is to gain understanding about how older adults, who are retired or contemplating retirement, make decisions regarding their educational experiences.

I understand that this research will be of benefit to *ELDERHOSTEL Canada*, the academic community, the researcher, organizations and adult educators interested in the educational interests and interests of mature adults.

I have been informed that my participation in this study will not in any way interfere or deter from the regularly scheduled Elderhostel program for which I have enrolled and paid a fee.

I have been informed that the discussions will last approximately 60 minutes and be hosted by either the researcher or the *ELDERHOSTEL Canada* representative.

I freely agree, without coercion, pressure or constraint, to contribute to this study by discussing *ELDERHOSTEL Canada* with my fellow participants and researchers.

I agree to the use of an audio tape recorder.

I understand that my participation in this research will cause my no personal harm.

I have been guaranteed, by the researchers, that my identity will remain anonymous.

I understand that I have the right to withdraw from the study at any time and refuse to answer any questions.

_____ _____

Today's Date Program Week

_____

ELDERHOSTEL Canada Location (Site, City, Province)

Thank you!

Appendix G: Results of the Demographic Questionnaire

N= 133 (156 total - 23 demographic questionnaires from the Atlantic Region which were not provided)

Permanent Residence

Location	# Participants	%
Rural	26	21
Urban	90	73
Other (Suburban)	8	6
Total	124	100

Response Rate = 93.2%

Missing Cases = 9

Country of Residence

Country	Number	%
Canada	80	60
England	1	1
USA	51	39
Total	132	100

Response Rate = 99.2%

Missing Cases = 1

Appendix G: Results of the Demographic Questionnaire

Province or State of Residence

Country	Province/State	# of Participants	% of Total
Canada	Alberta	15	119
	British Columbia	14	111
	Manitoba	4	32
	Nova Scotia	2	16
	Ontario	39	31
	Québec	2	16
	Saskatchewan	1	8
England	North Yorkshire	1	0.8
United States	California	11	8.7
	Florida	3	24
	Idaho	1	8
	Illinois	2	16
	Kansas	1	8
	Kentucky	1	8
	Maryland	2	16
	Massachusetts	1	8
	Michigan	3	24
	Minnesota	1	8
	North Carolina	2	16
	New York	5	40
	New Jersey	6	48
	Ohio	2	16
	Oregon	1	8
	South Dakota	1	8
	Texas	1	8
	Washington State	2	16
	Wisconsin	2	1.6
	TOTAL	126	100%

Response Rate = 94.7

Missing Cases = 7

Appendix G: Results of the Demographic Questionnaire

Travelling Alone?

Response	Number	%
Yes	101	76.5
No	131	23.5
Total	132	100%

Response Rate = 99.2%

Missing Case = 1

Not Travelling Alone -- Travelling With:

Response	Number	%
Friend	26	26.3
Member of Family	5	5.1
Spouse & Friend	4	4.0
Spouse	64	64.6
Total	99	100%

Response Rate = 74.4%

Missing Cases = 34

Who Made the Decision to Participate in Elderhostel?

Choice	Number	%
You	44	34.4
Joint decision with spouse	44	34.4
Joint decision with friend	12	9.4
Spouse	7	5.5
Joint decision with friend and spouse	7	5.5
Friend	6	4.7
Family member	5	3.9
Joint decision with family member and friend	3	2.3
TOTAL	128	100

Response Rate = 96.2

Missing Cases = 5

Appendix G: Results of the Demographic Questionnaire

Total Number of Elderhostel's Attended?

# of Sites	# Participants Responding	%
1	46	35.1
2	18	13.7
3	13	9.9
4	9	6.9
5	6	4.6
6	8	6.1
7	2	1.5
8	5	3.8
9	3	2.3
10	3	2.3
11	1	0.8
12	2	1.5
13	2	1.5
14	1	0.8
15	3	2.3
17	2	1.5
18	4	3.1
20	3	2.3
Total	131	100

Response Rate= 98.5%

Missing Cases = 2

Minimum = 1
Maximum = 20
Range = 19
Mean = 4.8 sites
SD = 5.1

Appendix G: Results of the Demographic Questionnaire

Age

Age Range	Number of Participants	% of Total
40 - 44	1	0.8
45 - 49	1	0.8
50 - 54	1	0.8
55 - 59	10	7.6
60 - 64	25	18.9
65 - 69	35	26.4
70 - 74	38	28.7
75 - 79	13	9.9
80 - 84	8	6.1
85 - 90	1	0.8
TOTAL	133	100

Response Rate = 100%

Missing Cases = 0

Minimum = 42 years
Maximum = 85 years
Range = 43 years
Mean = 68.4 years
Median = 69
SD = 7.3

Sex

Sex	# of Participants	%
Female	92	69.7
Male	40	30.3
TOTAL	132	100

Response Rate = 99.2%

Missing Cases = 0

Appendix G: Results of the Demographic Questionnaire

Current Professional Status

	# of Participants	%
Fully Retired	110	83.3
Part-time Employed & Retired	11	8.3
Full-time Employed	9	6.8
Student or Housewife	2	1.5
TOTAL	132	100

Response Rate = 99.2% Missing Cases = 1

Preferred Place for Learning

Location	# of Participants	%
Classroom	3	2.3
Field Site	24	18.2
Combination of Classroom and Field Activities	105	79.5
TOTAL	132	100

Response Rate = 99.2% Missing Cases = 1

Appendix H: Pattern of Decision-Making Factors
Preliminary Analysis

Sequencing Patterns for Decision Criteria **Subject = Area of study; course** **Program = type of program, content of program**		
Location Accommodations Subject	Location Facilities Courses	Subject Location Facilities
Location Subject Accommodations	Location Cost Program	Subject Location Time of Year
Location Subject Price \Value \Cost	Location Time of Year Cost	Program Friend Reunion Combined with another Trip
Location Subject	Location Time of year Program Cost	Program Location Time of Year
Location Subject Time of Year	Geographical Area Friend Educational opportunity	Program Location Cost
Location Program Negotiate with partner	Geographical Area Subject Transportation by bus	Program Facilities Food
Location Program Negotiate with partner Time of Year Cost	Subject Learning opportunity	Program Family Visit
	Subject Location Joint Decision with friends	Program Location Accommodations
Location Program - activity not too strenuous Near Family	Subject Program Location	Program Location Need easy transportation
Location Close to home Time of Year	Subject Location	Program Friend Reunion
Program -- activity essential Location Cost	Accommodation Program Location	Program People Location
Program -- not strenuous Location	Accommodation Location Content	Transportation - Bus access essential Location Subjects

Sequencing Patterns for Decision Criteria Subject = Area of study; course Program = type of program, content of program		
Program Location - new Cost	Facilities Program Travel Partner Near home ... cost efficient for first time	Get an Urge Pick a geographical Area Program or two Phone for availability
Pick partner Agree on location Pick program	Time of year Affordable	Time of Year Subject Travel costs
Decide on one-tank trip Location Program Facilities	Cost Ability to travel alone	Facilities

Appendix I: A Summary of the 14 Decision-Making Factors

Factor #1: Location	
Those elements in the decision making process that relate to the participant's desired destination and may include consideration of the geographical attractions, area assets, feelings of nostalgia to the area or general curiosity about the location .	
Major Sub-Component	***Descriptive Elements***
Geographical Attractions	geology, flora and fauna, mineralogy, woods, seas shore, near water, mountains, attractive scenery, natural attractions
Area Assets	local tourist attractions, family in area, family in region, golf courses, good time of year to visit this location
Nostalgia	have spent time in the area before, have been to the site before, attending a reunion or reuniting with a friend/family member here, visit Alma Mata, married here, ancestors buried here
Curiosity	see a new part of the country or visit a new country, want to visit a new location I've never been, curious about the area, always wanted to come here

Factor #2: Travel	
The travel factor relates decisions made concerning the travel distance, method of transport, and length of the journey.	
The One-Tank-Tripper	***The Vacationer***
• must be able to drive to the site by car • must be able to access site by bus • return participant who prefers to stay close to home • new participant who is unsure about their first Elderhostel experience • will take a week: 'just' to do an Elderhostel • convenience of others	• piggy back-to-back sites if the travel distance is long • want an overseas experience • want to attach the Elderhostel week to plans already made • in general, will not take a week just for an Elderhostel • high travel costs mean higher justification for journey required

Factor #3: Program	Factor #4: Course Content
Program decisions that relate to the structure of the programs offered and the degree to which there is a physical component built into the program.	***Course content relates to decisions made about the desired learning, or anticipated learning, experience available through the courses offered.***
• outdoor pursuits • programs outside the classroom • interested in field trips • opportunity to practice learning is viewed as added value • level of physical activity required combine physical and intellectual activity • must have a physical component • program structure, time in class versus time out of class	• attracted to specific subject • fits personal learning needs • sounded interesting • topic appeals • look for levels of learning • courses must relate to the area • builds on current learning goal • expertise of the professors • general interest vs extended learning in a given area
*****concentration of one subject*****	

Factor 5: Accommodations	
Decisions related to accommodations includes the items typically associated with hotel accommodations, including single vs shared bathrooms, single vs double occupancy, access, quality of meals, beds, and special options.	
• Private vs semi-private vs Communal bathroom facilities • General comfort • Quality of food • Ability to cater to special needs • Quality of beds	• RV facilities • Won't stay where a roommate is imposed • Single room requirement • Ability to get 'around' (ie. Elevators, amount of walking to classes) • Arrive early/stay late options

Factor #6: Cost
Cost is defined as all monies which must be spent to register for a course and travel too and from the location.
• bottom line: hostellers want value for money • prefer to travel off season to obtain better rates • most cost efficient, when travelling a long distance, to combine Elderhostel with a family visit or previous holiday plans • low price of Elderhostel means you can visit two sites on the same travel budget • exchange rate influences country choice • late site confirmation can result in higher travel costs • travel within North America is considered good value for money • travel abroad is considered on par with commercial operators

Factor #7: Dates
The date factor considers the best suitable time for a participant to enroll in an Elderhostel program.
• try to avoid tourist seasons • want to stay at home when the weather is good • want a particular type of weather: warm in winter, cold in summer • must fit in with vacation from part-time or full-time employment • must fit in with busy retirement schedule • have a personal preference for travelling at a certain time of year • only one time frame available this year

Factor #8: Negotiate with Travel Companion
The process whereby two or more Elderhostelers engage in some form of negotiation to reach a consensus regarding which site to attend.
• final selection is a joint decision with travel partner • must follow a particular negotiation process with travel partner • compromise with partner • deals with partner for alternating first choice

Factor #9: Social	
Social choices focus on the interest in being with and meeting people, similar to oneself, people with a particular zest for life.	
• friends were coming • spouse persuaded me to come • meet people with a kindred spirit • congenial, interesting, fun people • enjoy the same social class • no snobbery of people acting more intelligent than others	• social fabric binds everyone • meeting people • people always mix immediately • everyone welcome • safe for single participants • casual atmosphere • age of fellow participants

Factor #10: Sites	
Site considerations are those elements, specific to a location, most of which can be managed by the local site coordinator.	
• reputation of the program, instructors, site and or volunteer coordinators, and institution • access to the site • access around the site	• ability for the site to cater to special needs such as hearing impairments and walking difficulties • extra curricular activities planned but not advertised • involvement of local site coordinator

Factor #11: The Elderhostel Organization	
Decisions related to Elderhostel's policies, program requirements, organizational philosophy, and methods of operating.	
• attended before and liked the experience • 1st or 2nd choice cancelled • appreciate good quality instruction • like to try new organizations • age eligible now • unique program • not a tourist organization	• discipline of class attendance policy • travel alone or with a companion, equally accepted and welcome • recommended by friends/family • like the attitude of the Elderhostel staff and volunteers

Factor #12: Personal Requirements	
Decisions made that relate to some personal need or interest	
• must travel alone • need intellectual stimulation • level of activity • selecting a travel companion • always wanted to go to college	• fitness requirement • physical limitations • visiting the area but do not want to impose of friends due to their age

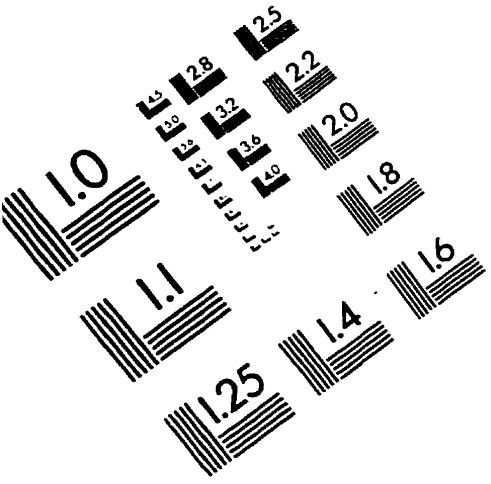
Factor #13: Escape
The choice to attend an Elderhostel site, because an individual feels they must get away ot take a break from some situation in their personal life.
• needed a break from regular activities • family tragedy, needed to get away • living with children, needed space

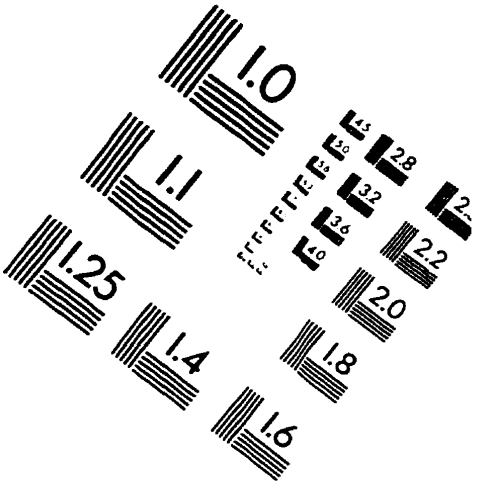
Factor #14: Information
Factors that relate to the content, quality, volume, and type of information participants receive.
• catalogue: content, distribution, access • word of mouth • participant endorsement • read about Elderhostel in newsletters, papers or magazines • received a catalogue before becoming age eligible • friend had a catalogue

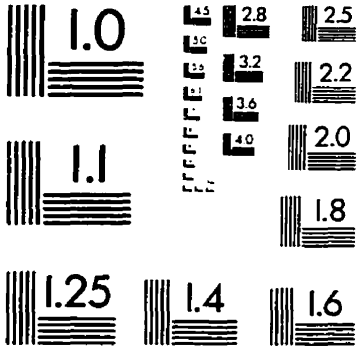
Appendix J: Participant Typology

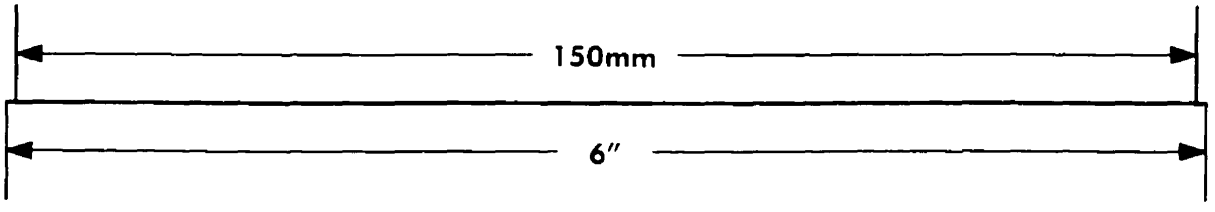
Label	Description
Activity Oriented	The Activity Oriented will only register in programs that include some form of physical activity. This could be golf, hiking, canoeing or walking through nature to bird watch. This type of person enjoys the outdoors, wants to learn in the natural environment, and will not register for programs where the entire Elderhostel experience is in a classroom.
Geographical Guru	Selects a region, area or city they would like to explore. The type of Elderhostel program is not a priority consideration. What draws this person to a given site is the opportunity to see, explore and learn about a new area. The primary interest is to learn about the area and when possible, geographical gurus will extend their visit to continue exploring.
Experimenter	The experimenter is the first time participant who is investigating Elderhostel by trying a variety of programs to see where their interest lies. Their first experience is close to home (one tank of gas) and they select their program based on: (1) enrol in a course with a physical activity option because they are afraid of entering a setting which is too 'academic' or (2) they enrol in an 'academic' course in which they possess some pre-requisite knowledge.
Adventurer	Willing to go anywhere and try anything. They are looking for new experiences in learning and socializing and will even sacrifice accommodation preferences just to have a new experience.
Content Committed	Subject is everything. Willing to travel anywhere to build on their current knowledge base in a particular subject area. Good instruction at a university level is critical and this person is willing to wait until their subject comes up rather than attend a site outside their subject area. Location is not as important.
User	This individual sticks out like a sore thumb and can be ostracized by the regular hostellers. The user is attending for reasons not related to Elderhostel or the program, but for some personal benefit, like cheap meals and accommodations while visiting in the area.

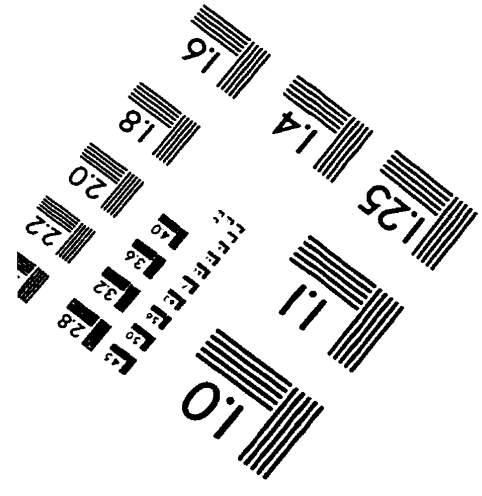
IMAGE EVALUATION
TEST TARGET (QA-3)

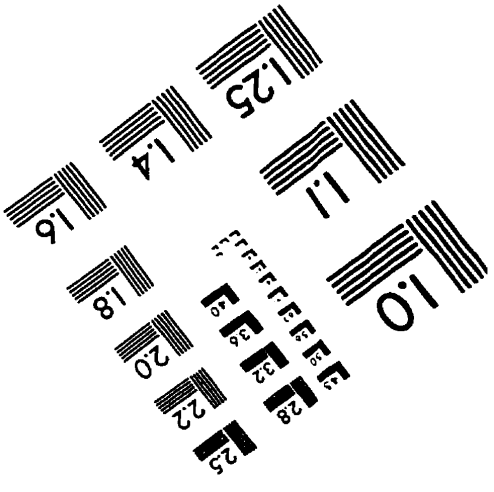












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